CallCenterAnywhere™

Interaction Manager

User's Guide

Version 7.1.7

CallCenterAnywhere USER GUIDE

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Introduction

What is Interaction Manager?

Interaction Manager is a web-based call control and Contact management tool for call center Agents. With Interaction Manager, agents can communicate with customers in different ways, including by phone, email, and the Web. Because Interaction Manager is browser-based, agents can work from any computer that has access to the Internet.

In general, an “Interaction” occurs any time a customer tries to reach the call center; usually by phone, email, or web-chat, although an Interaction can also occur when the customer leaves a voicemail message or asks an Agent to call back.

Most of the time, customers contact your call center (as opposed to directly calling or emailing you), and the CallCenterAnywhere software routes or “offers” the Interaction to an Agent.

To use Interaction Manager, you must have Internet Explorer, version 6.0 or above.

Projects and Workgroups

In this manual you may see occasional references to “Projects” and “Workgroups.” As an Agent, you don’t need to worry too much about either of them, since your Administrator creates them for your call center. Projects and Workgroups help connect the customer to the Agent that most likely has the information the customer needs.

In general, customers dial a phone number associated with a CallCenterAnywhere Project. Examples of Projects include “Sales,” “Technical Support,” “Accounts,” and so on. Each Project can send calls to one or more Workgroups. For example, the “Technical Support” Project could route customers to the “UNIX - English,” or “UNIX - Spanish” Workgroups.

A Workgroup is basically a list of Agents that are grouped together by skills or job function. For example, if you speak Spanish and are an expert in UNIX, your Administrator will probably put your name in the “UNIX - Spanish” Workgroup. When a Spanish speaking customer calls with a UNIX question, CallCenerAnywhere routes them to someone in that specific Workgroup first.

Interaction Manager Features and Benefits

- Browser-based interface, allowing agents to work locally (intranet) or remotely (Internet)
- Multimedia ready, accepting phone calls, emails, and Web originated chats and callback requests
- Conferencing feature allowing Agents, Supervisors, and customers in the same phone conversation.
- Interaction History showing what happens to customers when they reach your call center.
- Full billing control, so you can account for all calls
- Automatic Contact screen pop-up using ANI (Automatic Number Identification) or email address
- Automatic display of Project Name or phone number (DNIS) with each Interaction
- Web callback feature with support for specific call center scripts. Agents can get back to Web customers quickly and with the information the customer needs
- Predictive and Preview dialing features with support for specific call center scripts. (Predictive and Preview are available as optional features.)

A Quick Tour

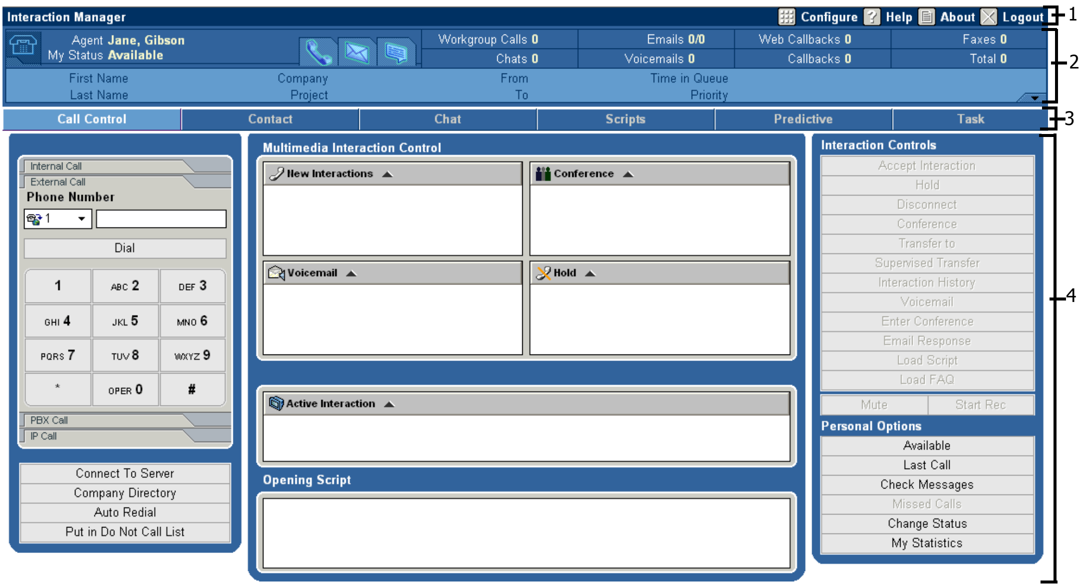


Figure 1-1 Interaction Manager Screen Overview

This chapter provides an overview for each of the main parts of the Interaction Manager (IM) screen (Figure 1-1):

Section # in Figure	ID
1	Configure Link, Help Link, About Link, and Logout Link
2	Information Bar - Detailed Information View
3	Interaction Bar
4	Interaction Screen Page(s)

Regardless of which IM screen is open, the Configure / Help About / Logout Links (1) and the Information Bar (2) always appear at the top of the screen.

Configure Link

At login, it is a good time to ensure that Interaction Manager is configured with your correct Phone Extension and Email information.

To do this, you must access the Configuration Menu by clicking the **Configure** link (Figure 1-2) located at the top right of the Interaction Manager screen.

Figure 1-2 Configure/Hel[p/About/Logout Buttons

From the Configure Menu, you can set:

- incoming interaction preferences
- the email client
- project billing for phone calls
- your telephone number
- customized icons
- time zone formatting
- date formatting

For details about configuring IM, refer to "Configuring Interaction Manager" on page 2-4.

Help Link

Click this link to open the Interaction Manager User's Manual in online format. Click the navigation buttons, drop-down list, or hyperlinked text to navigate to the area of interest.

About Link

Click this link to view the copyright and date information for your version of CallCenterAnywhere.

Figure 1-3 Example About Page

Logout Link

1. Click this link to logout of your Interaction Manager session.

   A confirmation message appears.

Figure 1-4 Logout Confirmation Message

2. Click **OK**.

Understanding the Information Bar

At the top of the Interaction Manager screen, an Information Bar (Figure 1-5) provides real-time information about:

- Phone Line Status Icon
- Agent Status
- Availability Icons indicating which Interaction Types you can receive
- Number of Waiting Interactions of each media type
- Web Server Status
- Contact Information for the Active Interaction(if a Contact has been assigned, see "Managing Contacts" on page 9-1).
- Time in Queue (Elapsed, Wrap-up)
- Customer Priority Rating

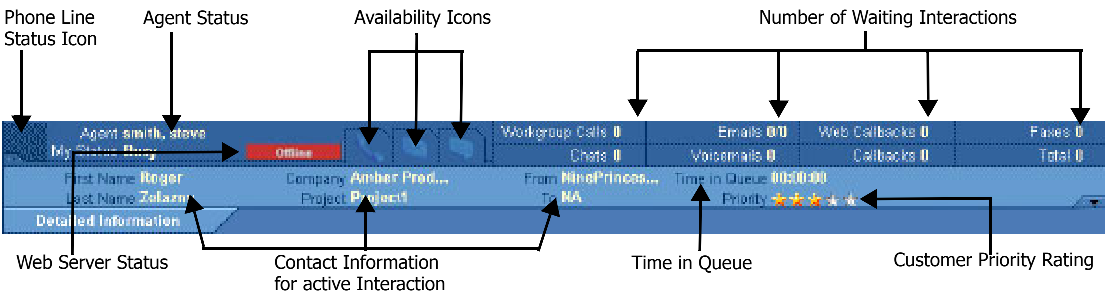
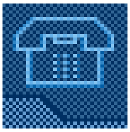
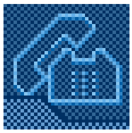
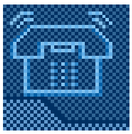
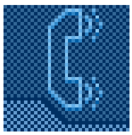


Figure 1-5 The Interaction Manager Information Bar

Phone Line Status Icon

The Phone Line Status Icon (Table 1-1) indicates the current state of your phone extension.

Table 1-1 Phone Line Status Icons

Phone Line Status Icon	Description
	Indicates that your phone **can** receive calls.
	Indicates that your phone is **off-hook**, but that you are not speaking (you may be dialing a number; your caller may be on hold, and so on).
	Indicates that your phone is **ringing**.
	Indicates that you are **speaking** with a caller.

Agent Status

The **Information Bar** indicates your current status in the **My Status** field.

Table 1-2 lists the predefined system statuses, the condition that triggers the status, and whether you can receive new Interactions while you are set to the status.

Table 1-2 Agent Statuses

Status	Meaning	Condition
Available	Available	Agent is not presently handling an Interaction. Agent can manually select this status, or can receive this status after completing an Interaction (configurable by Administrator).
Busy	Busy	Agent is not available to receive any other ACD Interactions.
Last Call	Busy	Set by Agent. Indicates that the Agent takes no more Interactions upon completion of the current Interaction.
On Break	On break	Set by Agent. Agent is not available to receive Interactions. **Note:** “No Answer” appears if the Agent does not accept a workgroup interaction within the time limit. “No Answer” is the same as “On Break.”

Your Administrator may have added additional statuses that control your availability. Consult your Administrator for a description of custom statuses.

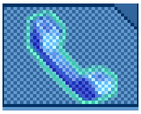
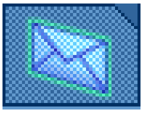
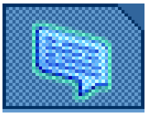
While your Supervisor views your status in real-time, and CallCenterAnywhere tracks your status for reporting during your Interaction Manager session, the **My Status** value is primarily for tracking.

To determine if you are presently available to receive Interactions, always refer to the Agent Status.

Availability Icons

The Availability Icons (Table 1-3) indicate your ability to receive Interactions by displaying one of three possible conditions:

Table 1-3 Availability Icons

Availability Icon	Description
	When the phone handset icon appears **bright**, you are available to receive Phone Interactions (calls, callbacks, Web callbacks, and so forth). When the phone handset icon appears **dimmed**, you are not available to receive additional Phone Interactions.
	When the envelope icon appears **bright**, you are available to receive additional Email Interactions. When the envelope icon appears **dimmed**, you are not available to receive additional Email Interactions.
	When the chat icon appears bright, you are available to receive additional Chat Interactions. When the chat icon appears **dimmed**, you are not available to receive additional Chat Interactions.

Number of Waiting Interactions

Each interaction type (Workgroup calls, Chats, Emails, Voicemails, Web Callbacks, Callbacks, and Faxes) a number appears to show how many of each interaction is waiting in the queue. The total number of interactions waiting in the queue also appears.

Notice that for email interactions, the banner shows two numbers (such as 0/0, 1/5, and so on.)

- The first number is the number of emails that are waiting in the Project queue.
- The second number is the number of emails that are still to be downloaded from the POP3 server.

Web Server Status

If Interaction Manager becomes disconnected from CallCenterAnywhere, a red “Offline” indicator appears on the Information Bar.

- While disconnected, CallCenterAnywhere does not route Interactions to you, but automatically attempts to restore your connection.
- When CallCenterAnywhere restores your connection, the “Offline” indicator disappears.

Contact Information for the Active Interaction

If a Contact is assigned, all information previously recorded about the customer appears. For more information, see “Managing Contacts” on page 9-1.

Time in Queue

Displays how long the customer interaction has been waiting in the queue.

Customer Priority Rating

Your Administrator can assign a Customer Priority level (Figure 1-6) to known customers of your Company. CallCenterAnywhere routes customers with a high priority before low priority customers. This ensures that important customers receive immediate attention.

Figure 1-6 Customer Priority

For first time callers, or for customers for whom your Administrator has not assigned a Priority level, CallCenterAnywhere displays the priority level of the *Project* through which the customer reached the call center.

CallCenterAnywhere displays the *Project* priority level only if there is no *Customer* priority level associated with the Interaction.

Information Bar - Detailed Information View

For all **Web Callback**, **ACD CallBack**, and **Chat Interactions**, view additional contact information by moving your mouse pointer over the arrow in the lower right corner of the Information Bar (Figure 1-7).

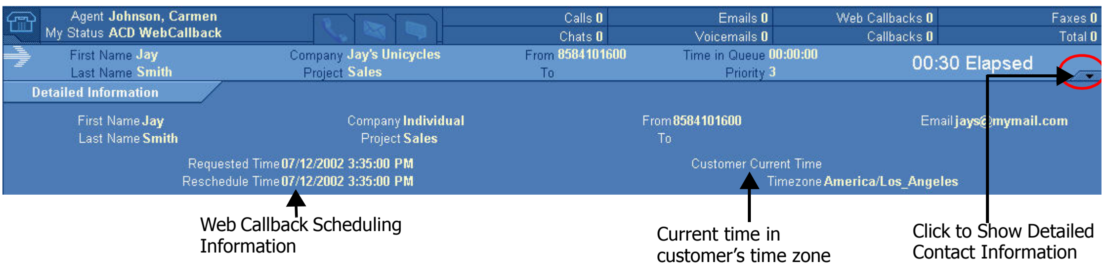


Figure 1-7 Information Bar: Expanded View

Some information, such as **Requested Time** and **Scheduled Time**, appear in the Detailed Information panel only if the active interaction is a Web Callback Interaction.

For more information, see "Managing Contacts" on page 9-1.

Interaction Bar

Interaction Bar

Figure 1-8 Interaction Bar

The Interaction Bar (Figure 1-8) appears just below the Information Bar. From here, you can access several different interaction types:

- Call Control Screen
- Contact Screen
- Chat Screen
- Scripts Screen
- Predictive / Preview Screen
- Task Screen
- Custom Screen (CRM Integration to an external application)

The interaction types you can access depend upon your system’s configuration and your workgroup.

Call Control Screen

The Call Control Screen (Figure 1-9 on page 1-13):

- Contains a dialer and other controls for making outgoing calls. For more information, see “Making and Billing Calls” on page 3-1.
- Alerts you to incoming Interactions.
- Displays the Interaction type and all available information about the caller.
- Provides controls for handling or redirecting the call.
- Has controls for managing your availability, checking messages and missed calls, and for configuring Interaction Manager.

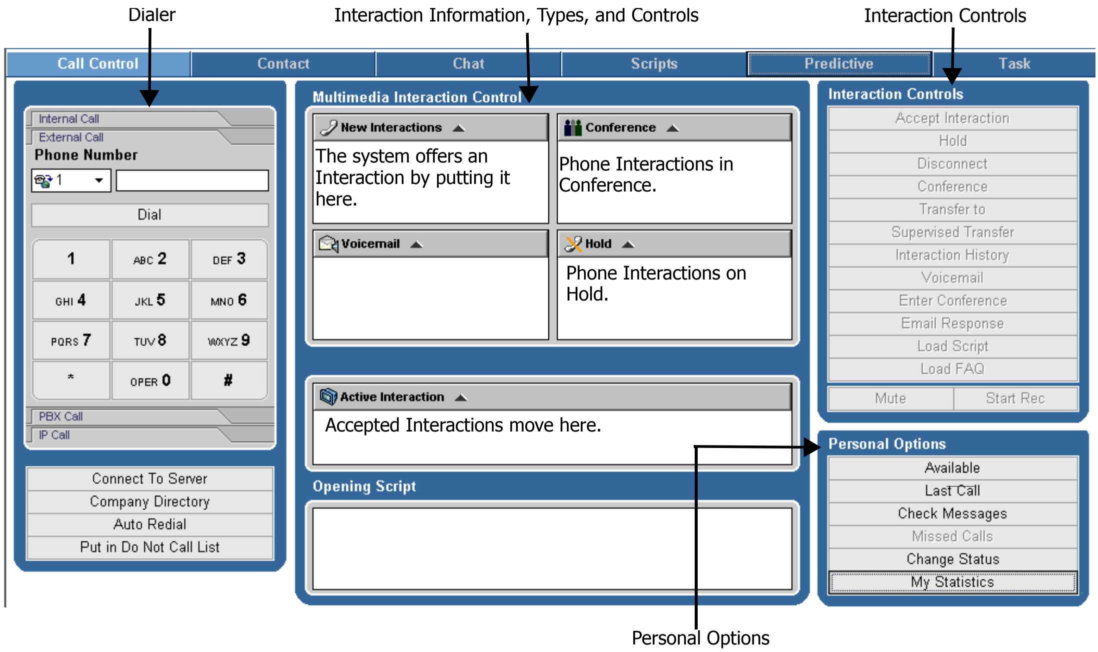


Figure 1-9 Call Control Screen

Interaction Screen Page(s)

This area changes, depending upon the Interaction selected from the Interaction Bar (3) above.

Contact Screen

The Contact Screen (Figure 1-10) lets you:

- Find/Enter/Modify Customer Contact Information
- Assign a Contact to an Interaction
- Enter Notes about a Contact
- Initiate an Outbound Interaction to the Contact

When information about callers resides in the Contact database, then as Interactions come into the call center, CallCenterAnywhere automatically gathers and fills in any information using the caller-ID, or ANI, or email address headers.

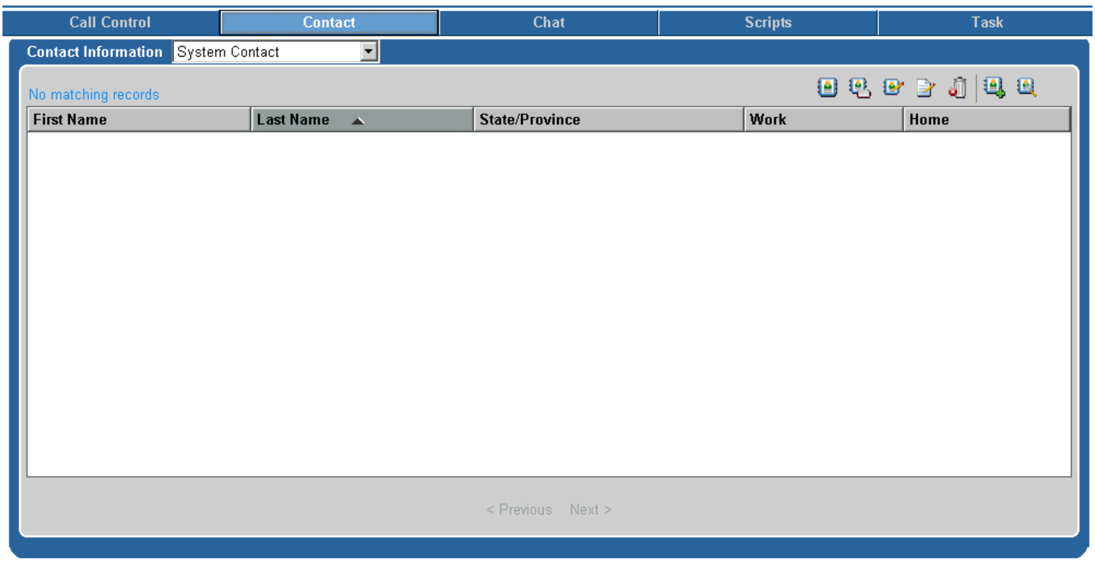


Figure 1-10 The Contact Screen

You can link additional information (such as a caller's name, address, and so forth) directly to the captured phone number or email address.

Once linked to a phone number or email address, CallCenterAnywhere retrieves and instantly displays information about the caller on your (or any other Agent's) screen the next time the caller Contacts the call center.

Chat Screen

Using the Chat Screen (Figure 1-11) you can:

- Engage in real-time text chats with call center customers.
- Take control of a customer's browser to assist the customer in completing a task, by using Chat screen collaboration controls.

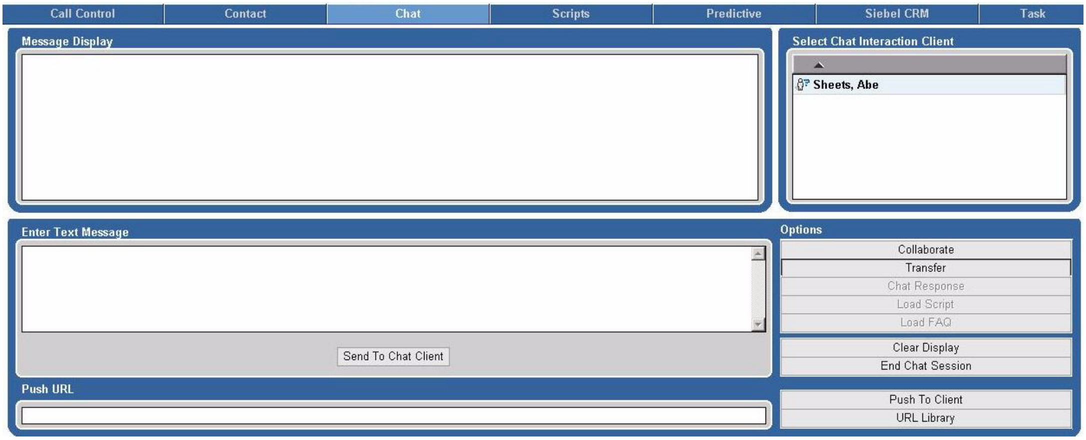


Figure 1-11 Chat Screen

Scripts Screen

From the Scripts Screen (Figure 1-12 on page 1-16) you can access information previously developed and saved by the call center Administrator for handling Interactions.

Scripts may contain answers to frequently asked questions, a scripted sales pitch, marketing copy, and so forth.

CallCenterAnywhere automatically displays the appropriate script for the Project with which you are working.

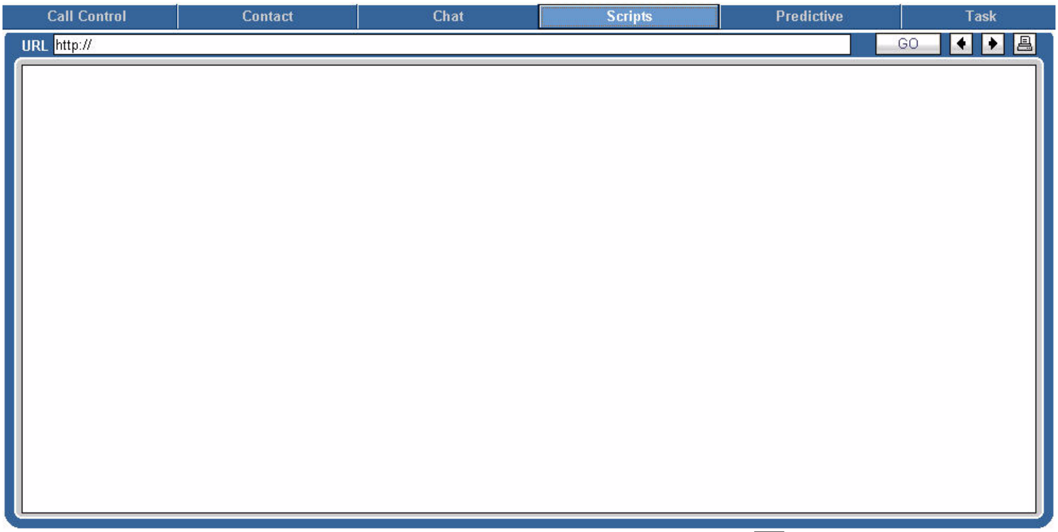


Figure 1-12 Scripts Screen

Predictive / Preview Screen

When available, use the Predictive Screen (Figure 1-13) to login to Predictive and Preview calling Projects.

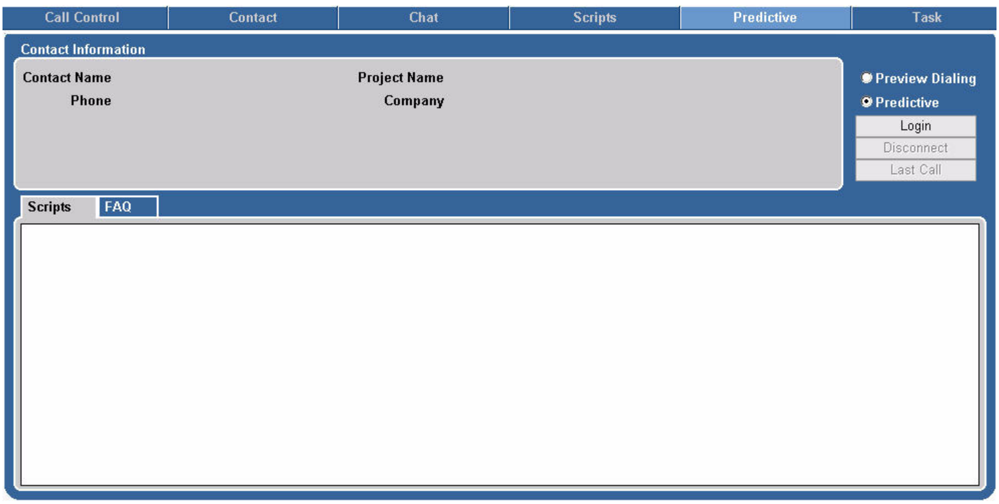


Figure 1-13 Predictive Screen

While signed on to the Predictive Project, CallCenterAnywhere automatically calls prospective customers and, when they pick up, rings your phone. When you accept the Predictive call, CallCenterAnywhere connects you with the prospective customer and displays the scripts defined for the campaign on your screen.

A CallCenterAnywhere Preview Project lets you control the placement of calls to prospective customers whose name and number appears on the Preview screen.

If you reach the customer, Interaction Manager provides script and FAQ information for handling the call.

The Predictive/Preview Screen is available only if your CCA is configured to handle Predictive or Preview Interactions.

Task Screen

CCA has flexible scheduling and task management built into the IM application. Agents can also use the Task Screen (Figure 1-14) features to dial, email, or fax Contacts with a simple mouse click.

Figure 1-14 The Task Screen

Custom Screen

Your System Administrator can configure an optional custom screen. For example, to integrate with another CRM application.

Getting Started

This chapter describes how to launch, log into, and configure Interaction Manager. When you finish this chapter, you will be ready to start handling Interactions.

Starting and Logging In

The first time you use Interaction Manager, use your browser to open the Interaction Manager Welcome Screen, much as you would load a typical internet website in a browser.

1. Start Internet Explorer version 6.0 or above.

2. Enter the address for CallCenterAnywhere provided by your call center Administrator.

   The CallCenterAnywhere Welcome Screen (Figure 2-1) appears.

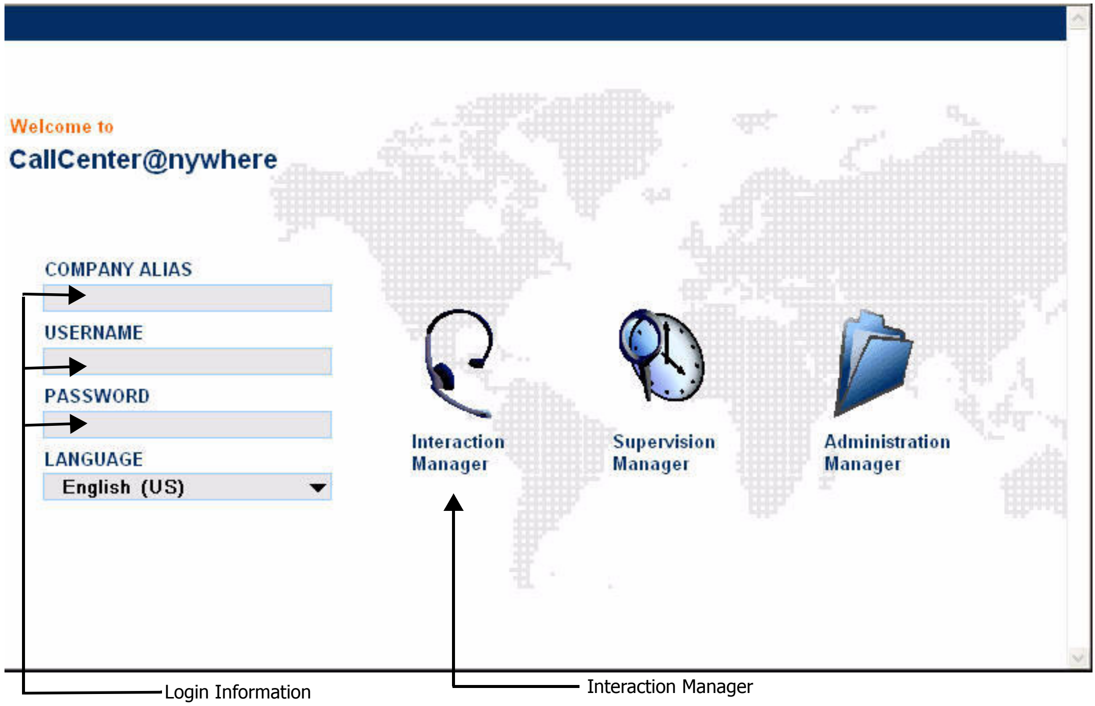


Figure 2-1 CallCenterAnywhere Welcome Screen

3. Enter your company alias, user name, and password.

4. Choose your language from the drop-down list.

5. Click the **Interaction Manager** icon.

   The CallCenterAnywhere Call Control Screen (Figure 2-2) appears.

Call Control Tab

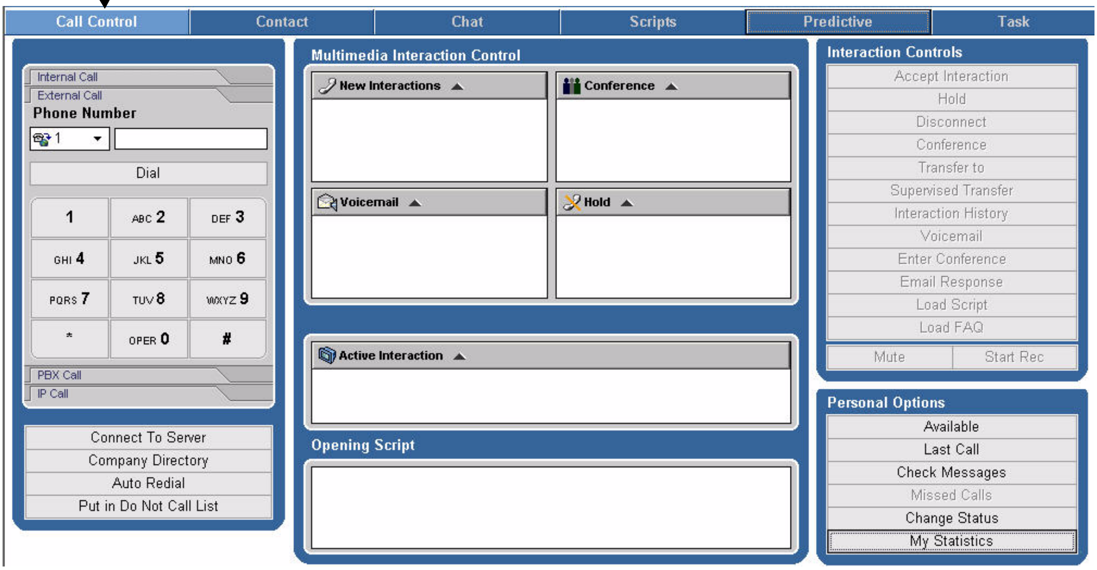


Figure 2-2 Call Control Screen

If the Call Control Screen does not appear, ask your system Administrator to confirm that you are using the correct address, company alias, user name, and password.

Add the CallCenterAnywhere Welcome Screen to your browser's Favorites menu. Then, for subsequent Interaction Manager sessions, simply load the CallCenterAnywhere Welcome Screen by choosing it from the menu.

Configuring Interaction Manager

You can configure the following features of Interaction Manager to meet your specific needs:

- Notification Mode (for New Interactions)
  - To set your Incoming Interaction notification mode
  - To set your Email program
  - To use a Welcome Prompt
  - To Work Off-Hook
  - To Use Automatic Call Acceptance
  - To Select a Project for Billing
  - To Change the Appearance of Icons
- Phone Extension Options
  - To Set Your Extension
  - To Set an Outside Phone Number
- Regional Options (Time Zone and Date Formats)
  - To Set Your Time Zone and Date Format
- Email Options
  - To Set Your Email Options
- Voicemail Prompts (Recording Prompts)
  - To Record Prompts with your Phone
  - Pre-recorded Prompt Format
  - To Use (Upload) Your Pre-recorded Prompts

Notification Mode (for New Interactions)

You can choose a visual notification, audible notification, or both, when you receive a new Interaction, from the General tab (Figure 2-4) of the Configuration dialog box.

Click the **Configuration** link (Figure 2-3).

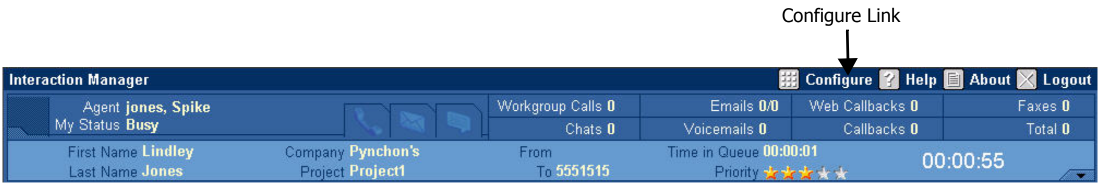


Figure 2-3 Configure Link

The Configuration dialog box opens to the **General** tab (Figure 2-4).

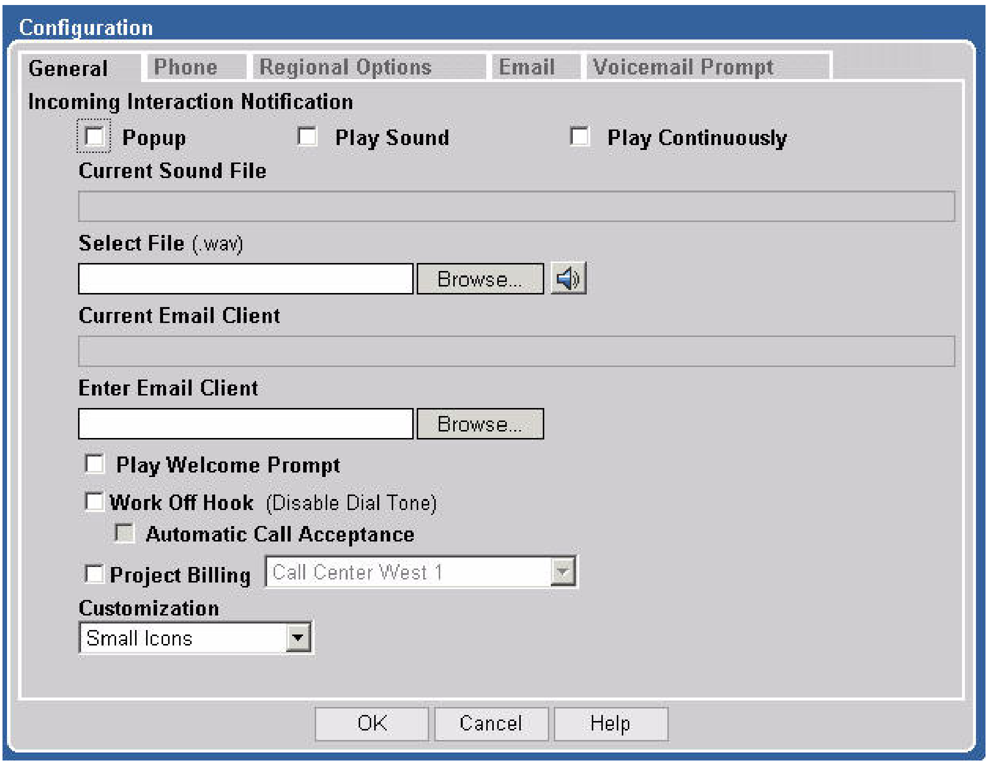


Figure 2-4 Configuration: General Tab

To set your Incoming Interaction notification mode

1. Click **Configure**. The Configuration -- Web Page Dialog box opens to the General tab (Figure 2-4 on page 2-5).

2. Choose one or more Incoming Interaction Notification modes:

   a. Select **Popup**: The Call Control screen automatically appears when you receive an Interaction. In Windows, the application icon at the bottom of your screen also flashes.

   b. Select **Play Sound**: Plays a sound one time when you receive an Interaction. To hear a sound, you must upload a .WAV file using the Configuration dialog:

      i. Under **Select File** (.wav), enter the name and location (path) of the sound file to use.

      or

      ii. Click the **Browse** button, locate the sound (.wav) file on your computer or network, and click **Open**.

      iii. If you want, click the sound icon  to hear the sound file and verify that it is the correct file.

      iv. Click **OK**.

You can load a sound file anytime. However, for the sound file to play, you *must* check the **Play Sound** option.

---

   c. Select **Play Continuously**: Plays the sound (.wav) file you loaded in step b (above) repeatedly, until you accept the Interaction.

3. Click **OK** to save your configuration settings.

To set your Email program

1. Click **Configure**. The Configuration -- Web Page Dialog box opens to the General tab (Figure 2-4 on page 2-5).

2. In the **Enter Email Client** text box, enter the name and location (path) of the email program to use with Interaction Manager

   or

   Click **Browse...** to browse for the file on your computer or network, and click **Open**.

3. Click **Accept** to save your configuration settings.

4. Click **OK**.

See “To Set Your Email Options” on page 2-17.

To use a Welcome Prompt

You can choose to play a Welcome Prompt to the customer before they begin speaking with you. An example of a Welcome Prompt might be, “Hello, my name is John Smith. Please enter your account number.” Welcome prompts are useful in environments where you give the same greeting to each caller.

To create a Welcome Prompt, follow the same instructions as creating a voicemail prompt. See “Voicemail Prompts (Recording Prompts)” on page 2-18.

1. Click **Configure**. The Configuration -- Web Page Dialog box opens to the General tab (Figure 2-4 on page 2-5).

2. Select the **Play Welcome Prompt** check box and click **OK**.

To Work Off-Hook

Working off-hook means that, instead of picking up the phone every time an Interaction arrives, all you need to do is click the **Accept Interaction** button.

1. Click **Configure**. The Configuration -- Web Page Dialog box opens to the General tab (Figure 2-4 on page 2-5).

2. Select the **Work Off-hook** check box and click **OK**.

   The Call Control Screen (Figure 2-2 on page 2-3) reappears.

3. In the Interaction Manager **Call Control** tab, click **Connect to Server** (Figure 2-5) and wait for the phone to ring.

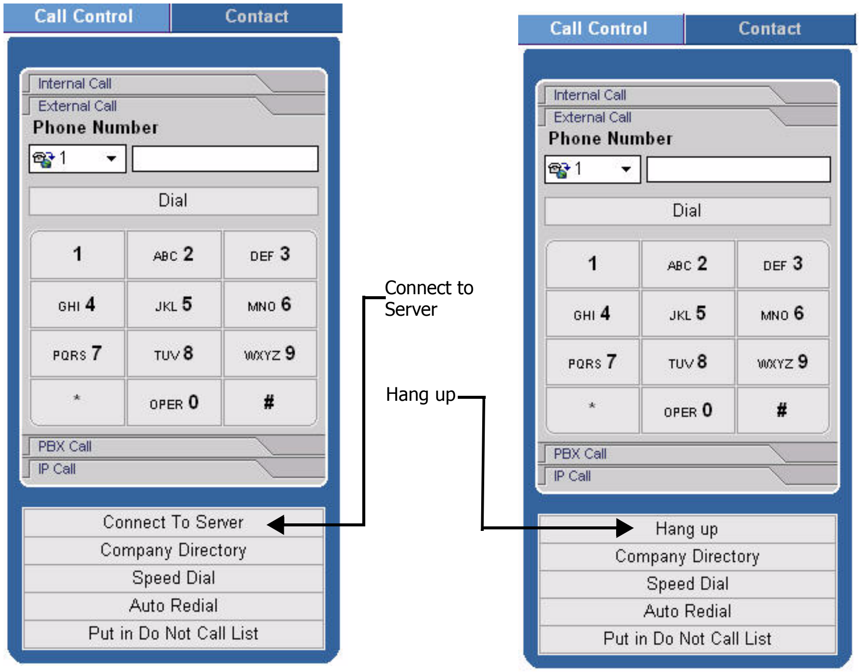


Figure 2-5 Call Control: Connect to Server

4. Pick up your telephone receiver to work off-hook.

   Notice that the **Connect to Server** option changes to **Hang up** (Figure 2-5 on page 2-8), as a reminder to hang up the phone when you finish accepting all calls.

You must repeat these steps each time you physically hang up the phone.

To Use Automatic Call Acceptance

A feature of working off-hook is that you can automatically accept Automatic All Distribution (ACD) calls as soon as they arrive in Interaction Manager. When a call arrives, a tone plays and CallCenterAnywhere connects you to the caller.

1. Click **Configure**. The Configuration -- Web Page Dialog box (Figure 2-4 on page 2-5) opens to the General tab.

2. Select the **Work Off Hook** check box.

3. Then, select the **Automatic Call Acceptance** check box.

4. Click **OK**.

The Automatic Call Acceptance feature only works with ACD calls. Calls made directly to your phone number (direct inbound and extension to extension) are not accepted automatically.

To Select a Project for Billing

If your Call Center is configured to allow Agents to make outbound calls, you must select a *Project*. Your outbound calls are billed against the Project you select and CCA uses a specific template for that Project. Therefore, it is important that you select the correct Project. If you select a different Project than the one already assigned to the contact, then one of two things will occur when CCA attempts to locate a matching number for the Project you select:

- If CCA cannot find a matching number, then it will not assign the contact to the current interaction.

- If CCA finds a matching number, then it uses the template for that Project, which may not match your expectations.

If you are not sure which billing Project to use, check with your Supervisor.

---

1. Click **Configure**. The Configuration -- Web Page Dialog box (Figure 2-4 on page 2-5) opens to the General tab.

2. Select the **Project Billing** check box.

   A list of available Projects opens (Figure 2-6).

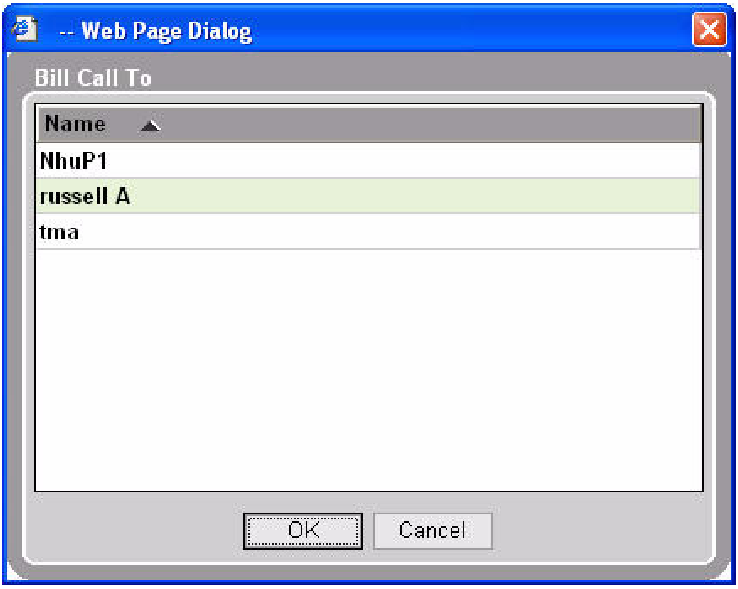


Figure 2-6 Example Bill To Project List

3. Select a Project from the list and click **OK**.

To Change the Appearance of Icons

You can change the appearance of icons by making them small without text, small with text, or larger. Figure 2-7 shows an example for the icons in the Contact tab.

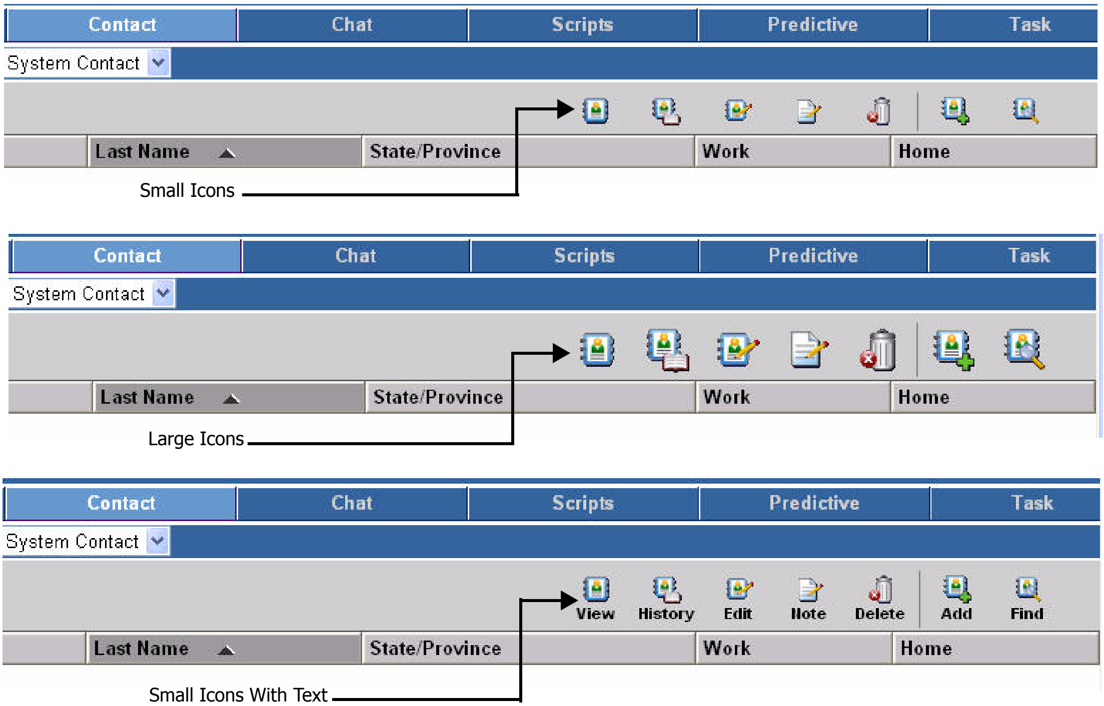


Figure 2-7 Example Icon Size Options

1. Click **Configure**. The Configuration -- Web Page Dialog box opens to the General tab (Figure 2-4 on page 2-5).

2. From the **Customization** list box, select **Small Icons**, **Large Icons**, or **Small Icons with Text**.

3. Click **OK**.

Phone Extension Options

You can access the call center from a variety of locations. To receive calls at your present location, select the type of system your company uses to route calls and then enter your personal extension on that system.

If you work from multiple locations, configure Interaction Manager so that CallCenterAnywhere knows to route Interactions to your present location. For example, if you access the call center from both your home and your office location, configure Interaction Manager *each time* you change locations.

To Set Your Extension

1. Click **Configure**. The Configuration -- Web Page Dialog box (Figure 2-4 on page 2-5) opens to the General tab.

2. Click the **Phone** tab (Figure 2-8).

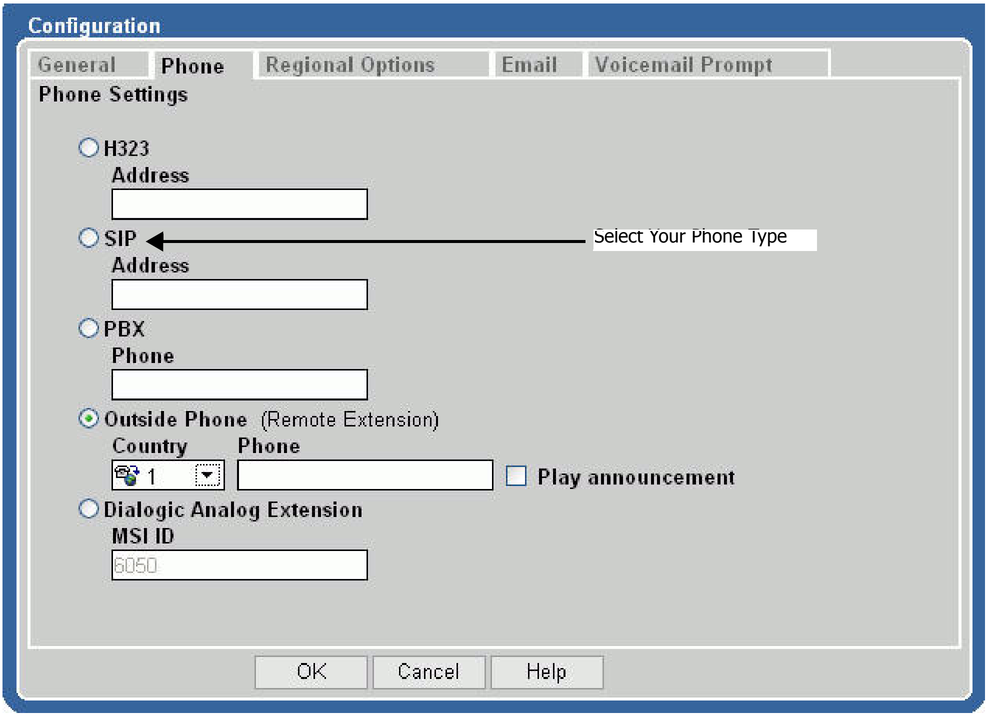


Figure 2-8 Configuration: Phone Tab - Phone Type

3. Choose your phone type. If you are not sure which type you are using, ask your call center Administrator.

    - If you choose **H323**, enter the IP address in the corresponding **address** box.
    - If you choose **SIP**, enter the IP address in the corresponding **address** box.
    - If you chose **PBX**, enter your extension number in the corresponding **phone** box.
    - If you work remotely, for example, if you work at home or at a site that is different from the call center:

        i. Click **Outside Phone** (Figure 2-9).

        ii. Then, select your Country Code and enter your phone number.

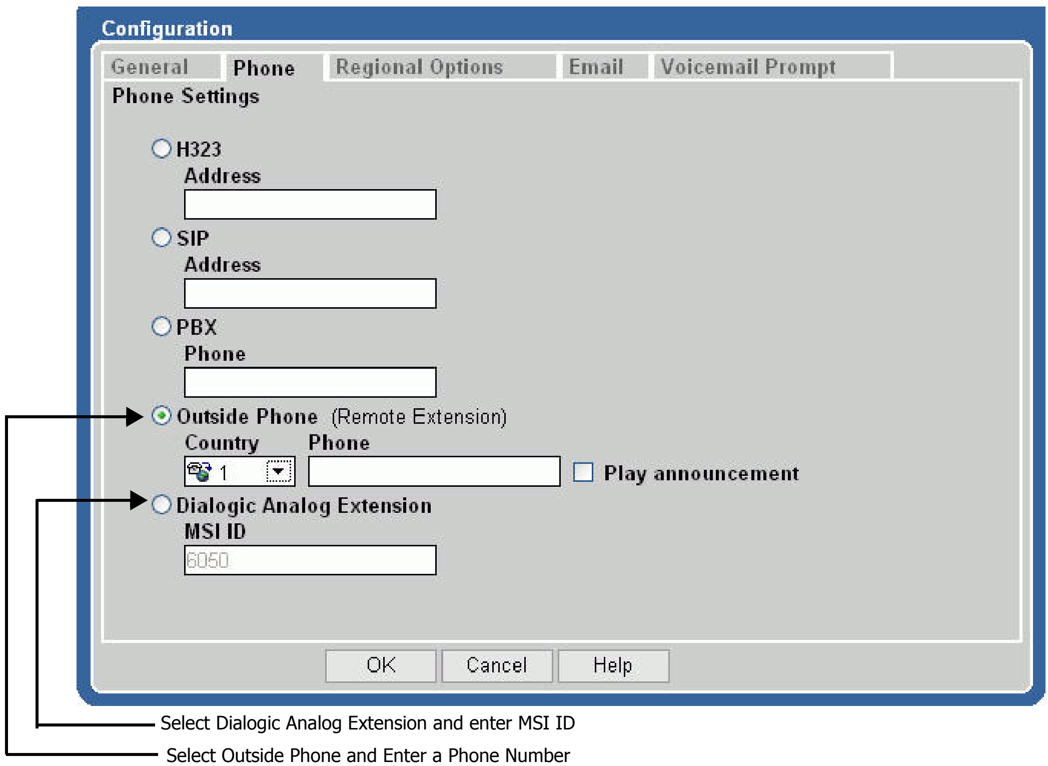


Figure 2-9 Configuration: Phone Tab - Remote

If you select the Outside Phone radio button, you can also select the **Play Announcement** check box. When selected, the system plays a recorded message telling you there is a phone interaction waiting to be connected and provides the option of *accepting* or *declining* the phone Interaction.

- If you chose **Dialogic Analog Extension**, supply your MSI Identification number in the **MSI ID** box (Figure 2-9 on page 2-13).

If you have an MSI extension, you can also choose to work off-hook. See "To Work Off-Hook" on page 2-7 for more information.

4. Click **OK** to save your configuration settings.

To Set an Outside Phone Number

If you plan to travel from one workstation to another, then before you leave:

1. From the Call Control Screen (under Personal Options), click the **Last Call** button (Figure 2-10).

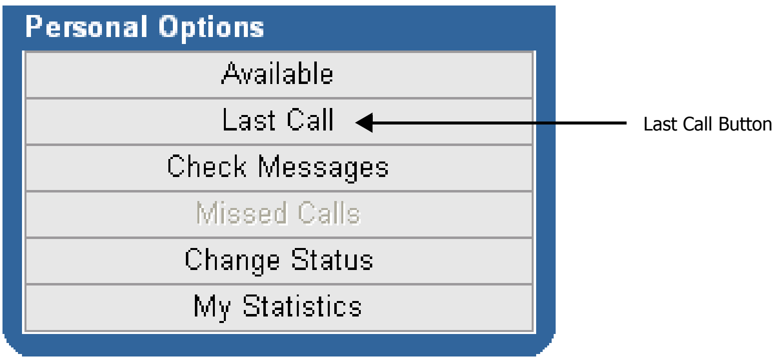


Figure 2-10 Call Control: Last Call Button

2. Click **Configure**. The Configuration -- Web Page Dialog box opens to the General tab (Figure 2-4 on page 2-5).

3. Click the **Phone** tab (Figure 2-8 on page 2-12) and check **Outside Phone**.

4. Select the Country (from the drop-down list box) and enter the phone number that you will use at the other location.

5. Click **OK**.

6. Logout of Interaction Manager.

When you login at the other location, you will be ready to receive Interactions.

Regional Options (Time Zone and Date Formats)

You can set the time zone and date format for your Interaction Manager workstation. If you work in a different time zone than most of your customers, or different than your company headquarters, you can configure your settings to match their time zone and date format.

To Set Your Time Zone and Date Format

1. Click **Configure**. The Configuration -- Web Page Dialog box opens to the General tab (Figure 2-4 on page 2-5).

2. Select the **Regional Options** tab (Figure 2-11).

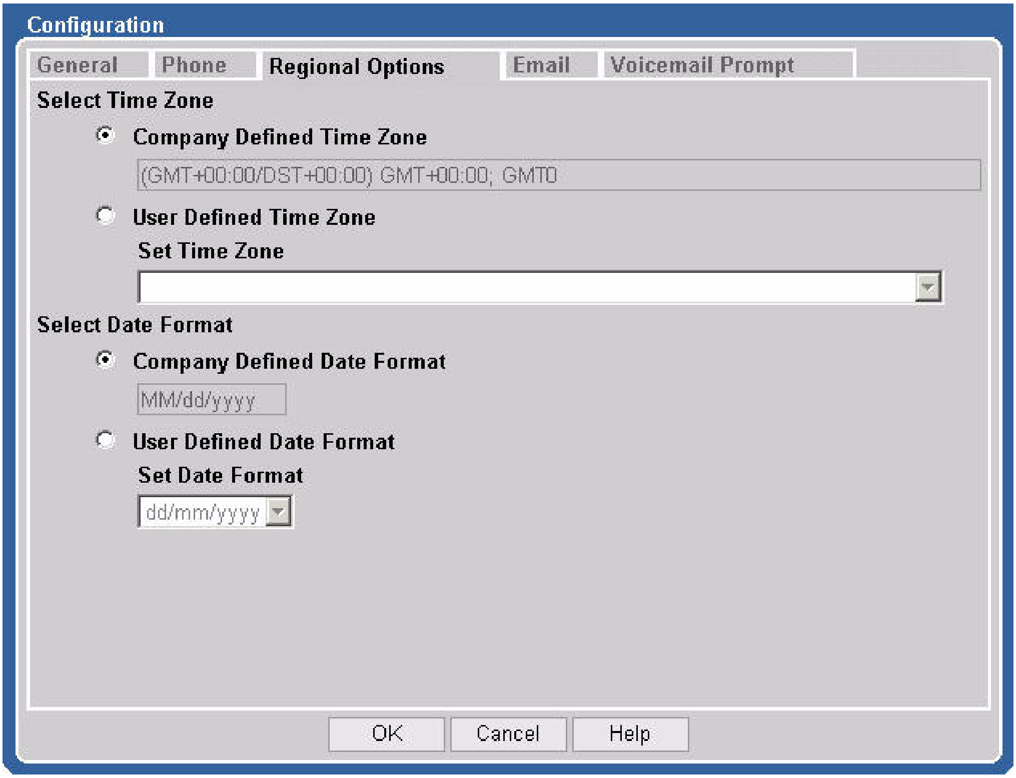


Figure 2-11 Configuration: Regional Options Tab

3. To set your time zone to the same time zone defined for your company, choose **Company Defined Time Zone**.

   To set a different time zone, click **User Defined Time Zone** and then choose a time zone from the **Set Time Zone** drop-down list.

4. To set the date format, select the **Company Defined Date Format**

   or

   Select **User Defined Date Format** and then select a date format from the drop-down list.

5. Click **OK** to save your configuration settings.

All Interaction Manager screens now display times and dates in the time zone and format you selected.

Email Options

To receive mail:

- There must be a server on your network that distributes mail (the POP3 server)

  and

- You must have an account on that mail server with your username and password

In most cases, your Administrators sets up your mail account and you will never need to change anything. However, if your call center requires you to change your POP3 login information, here's how.

To Set Your Email Options

1. Click **Configure**. The Configuration -- Web Page Dialog box opens to the General tab (Figure 2-4 on page 2-5).

2. Select the **Email** tab (Figure 2-12).

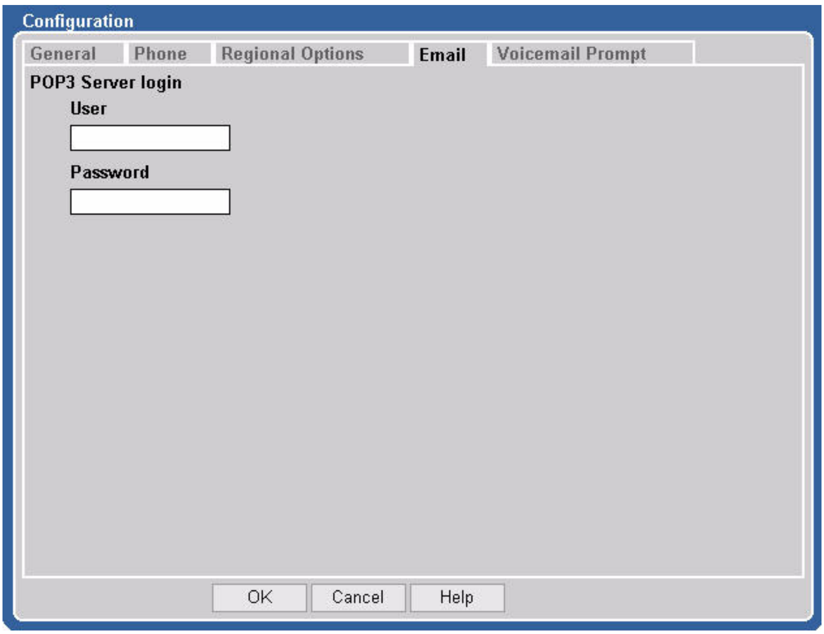


Figure 2-12 Configuration: Email Tab

3. Edit the User and Password fields. Enter the new POP3 login information at any time. If you are not sure what to enter, contact your Supervisor or Administrator.

If you click the mouse in the **User** and **Password** fields but you cannot edit the fields, it means that your Administrator has not yet entered your ***initial*** POP3 information in the Administration Manager program. Contact your Administrator for more information.

Voicemail Prompts (Recording Prompts)

You can personalize the recorded message that a customer hears just before you pick up the phone and before they leave a voicemail message.

Use your phone to record these messages or use existing messages. (Existing messages must be created in a specific format. See “Pre-recorded Prompt Format” on page 2-20.)

To Record Prompts with your Phone

1. Click **Configure**. The Configuration -- Web Page Dialog box opens to the General tab (Figure 2-4 on page 2-5).

2. Click the **Voicemail Prompt** tab, which opens to the **Record Prompts** tab (Figure 2-13).

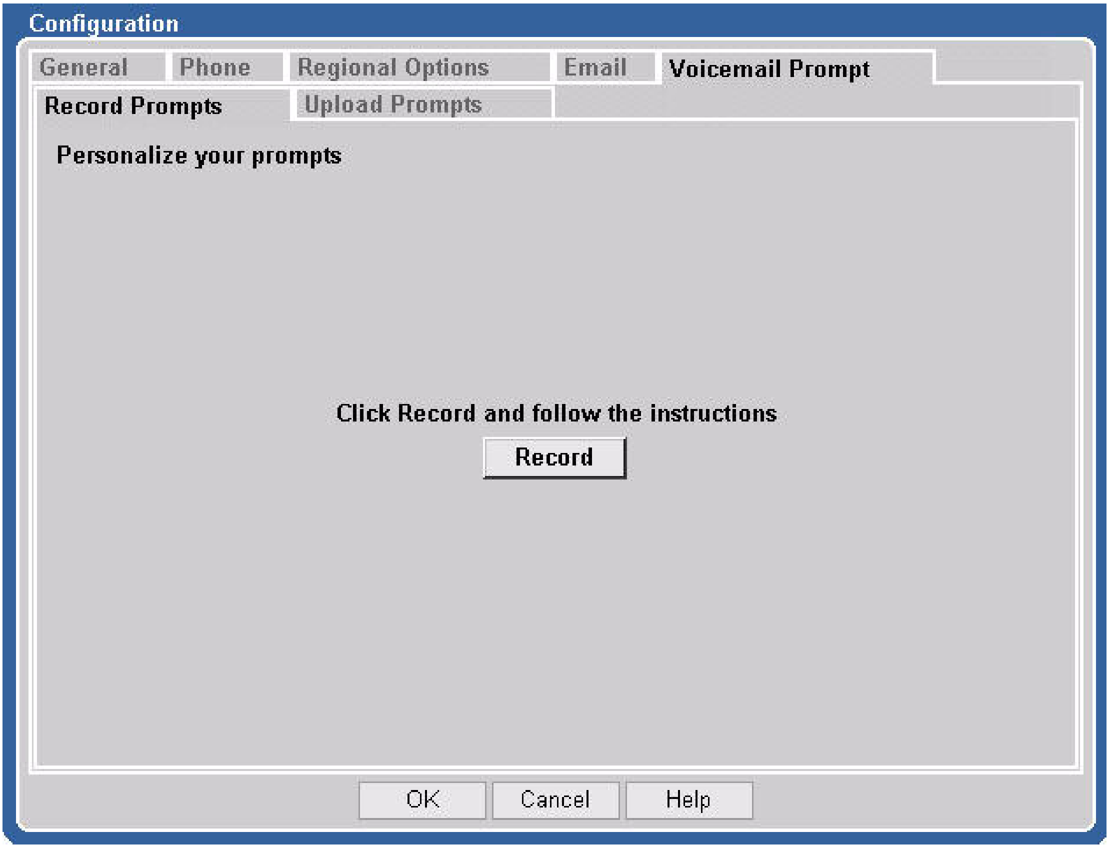


Figure 2-13 Configuration: Voicemail Prompt - Record Prompts

3. Click the **Record** button.

   The Record Voicemail Instructions screen (Figure 2-14) opens.

Figure 2-14 Record Voicemail Instructions

4. When your phone rings, pick it up, and follow the instructions you hear over your telephone hand set.

5. When you finish recording your message, press the **star** button on the phone or hang up.

6. Click the **Close** button.

7. Click **OK**.

Pre-recorded Prompt Format

Before you can select a pre-recorded message, you must first create one. (See “To Record Prompts with your Phone” on page 2-18.) You can have up to three different recorded greetings:

1. One recording states your name (such as “Jane Smith”).

2. One recording instructs the customer to leave a message for you (for example, “I’m sorry I’m not available to take your call. Please leave a message and I will return your call as soon as possible.”)

3. One recording greets the customer when they are routed to you (such as “This is Jane Smith. How may I help you today?”)

To ensure compatibility with CallCenterAnywhere, your recordings are automatically saved in files with the following characteristics:

Format: Windows PCM
Compression:uLaw
Sampling Rate:8,000 Khz (800 Mhz)
Resolution:8 bits

To Use (Upload) Your Pre-recorded Prompts

1. Click **Configure**. The Configuration -- Web Page Dialog box opens to the General tab (Figure 2-4 on page 2-5).

2. Click the **Voicemail Prompt** tab and then the **Upload Prompts** tab (Figure 2-15).

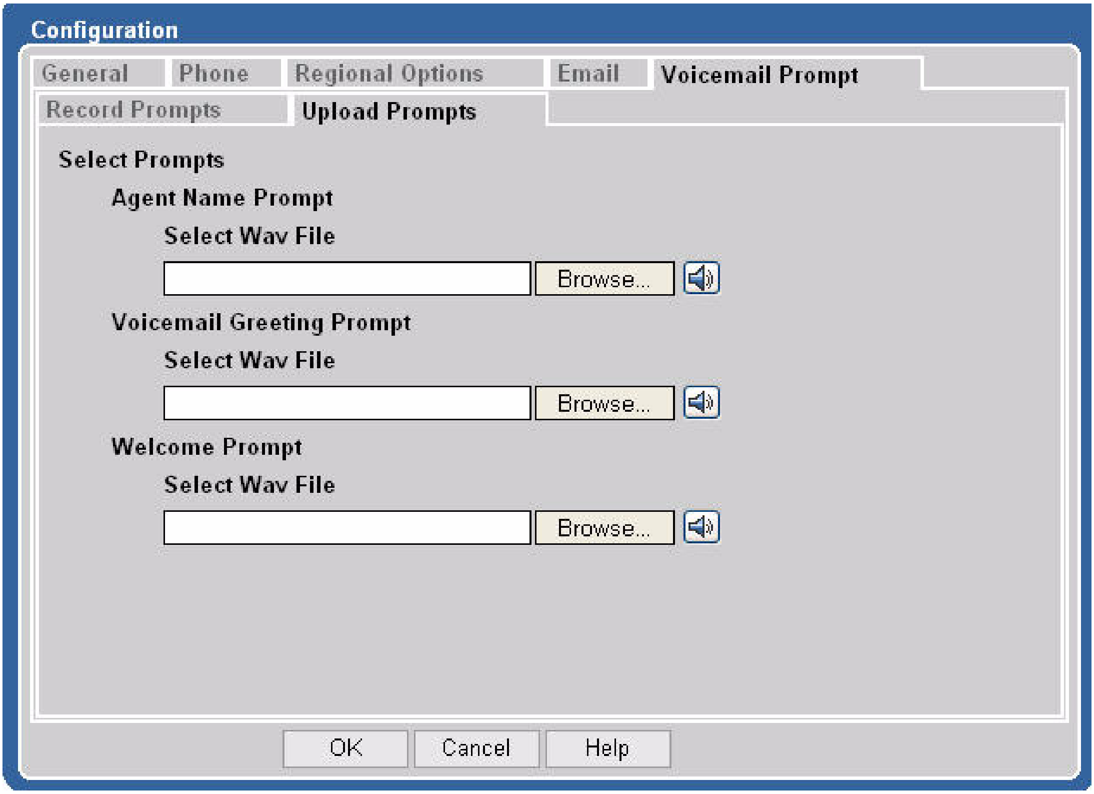


Figure 2-15 Configuration: Voicemail Prompt - Upload Prompts

3. Under **Agent Name Prompt**:

    a. To select a sound (.wav) file, click the **Browse** button and select the pre-recorded prompt containing your name.

    b. Click to listen to the recording to verify that it is correct.

4. Under **Voicemail Greeting Prompt**:

    a. To select a sound (.wav) file, click the **Browse** button and select the pre-recorded prompt that instructs the customer to leave you a message.

    b. Click to listen to the recording to verify that it is correct.

5. Under **Welcome Prompt**:

    a. To select a sound (.wav) file, click the **Browse** button and select the pre-recorded prompt that greets the customer before you pick up the phone.

    b. Click to listen to the recording to verify that it is correct.

6. Click **OK**.

Making and Billing Calls

Use Interaction Manager to dial numbers directly through the Call Control Dialer (Figure 3-1). You can perform:

- Internal Calling (calls to company extensions)
- External Calling (calls to phone numbers outside your company)
- PBX Calling (calls to a private branch exchange)
- IP Calling (VOIP calls to software phones running on someone's computer)
- Calls Using the Company Directory (to anyone in your Company Directory, even if you do not know their extension number)

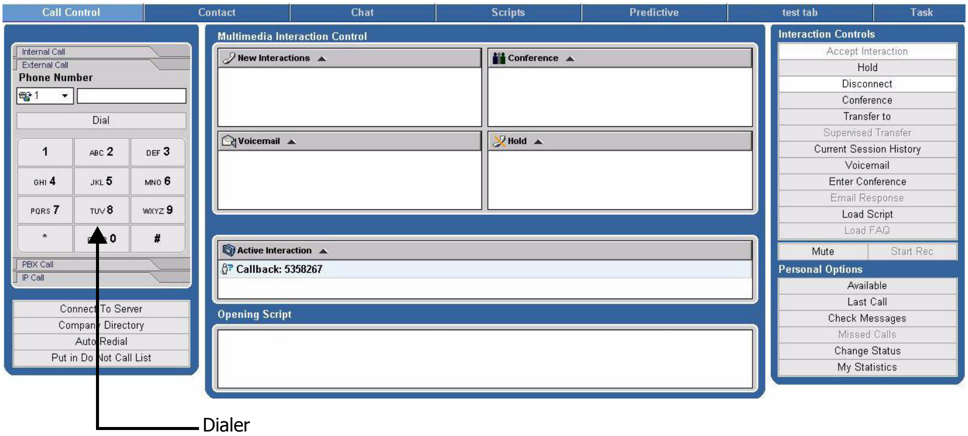


Figure 3-1 Call Control Dialer

Internal Calling

To call a person in your company using the Dialer's Internal Call tab, you must know the person's phone extension. If you do not know their extension, see "Using the Company Directory" on page 3-12.

To Make an Internal Call

1. From the Call Control Screen, select the **Internal Call** tab on the right.

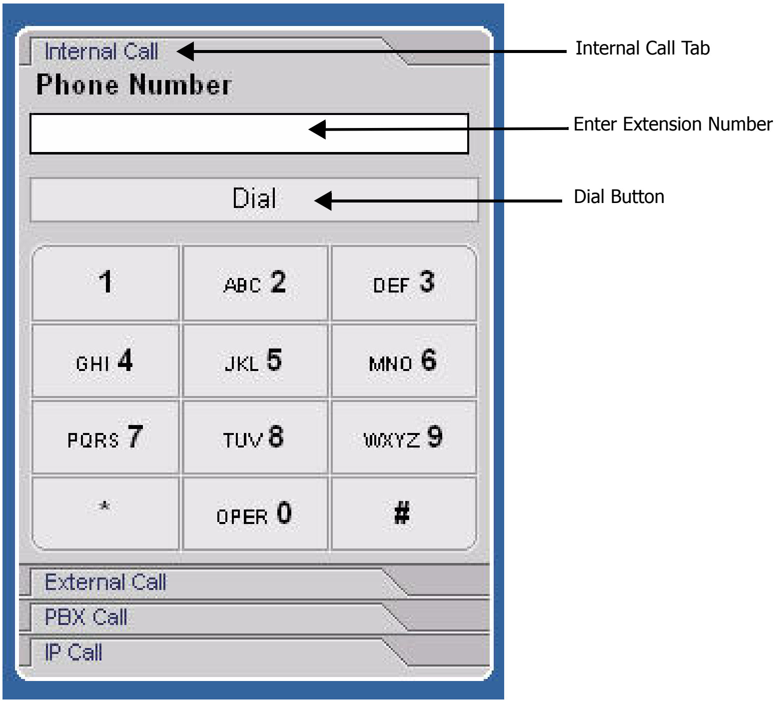


Figure 3-2 Dialer: Internal Call Tab

2. Type the extension number to call in the Phone Number box.

3. Click the **Dial** button.

   The ringing telephone status icon appears and your telephone rings.

If you set your Interaction to automatically accept Interactions, your phone will not ring. The call automatically becomes the Active Interaction.

4. When you pick up your handset, CallCenterAnywhere dials the call.

   The status icon now displays a phone off hook, your status changes from “Available” to “Busy,” and the person you are calling appears in the New Interactions box (Figure 3-3).

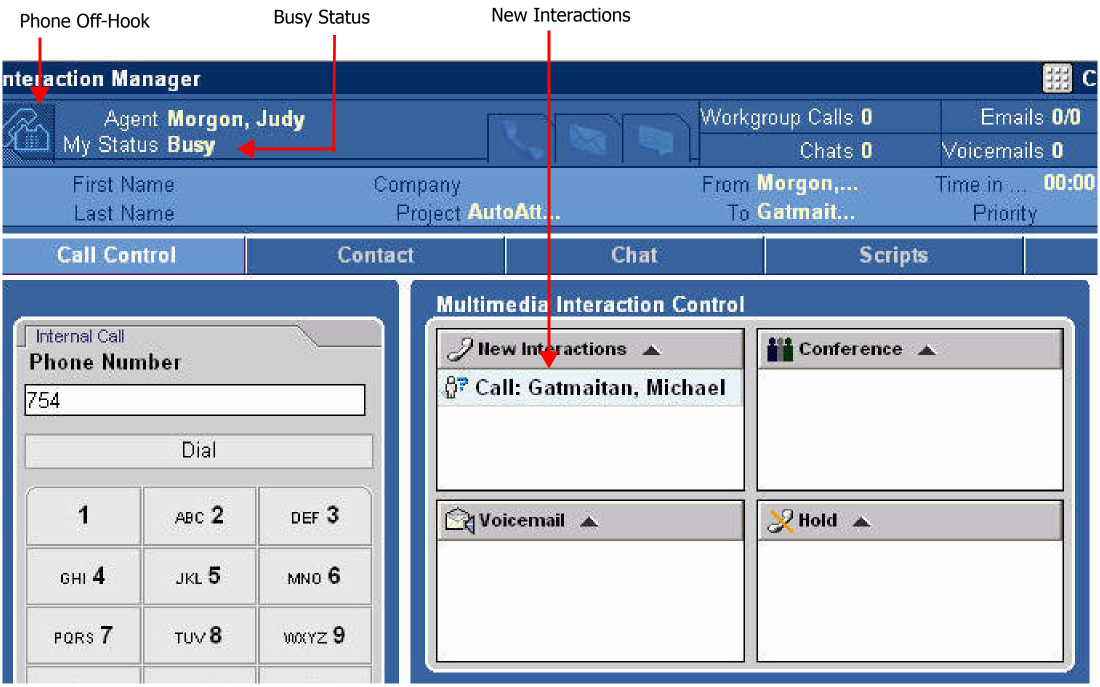


Figure 3-3 New Interaction (Internal Call)

5. When the phone connection is made (when the person picks up the phone or when voicemail begins), the call moves to the Active Interaction area (Figure 3-4).

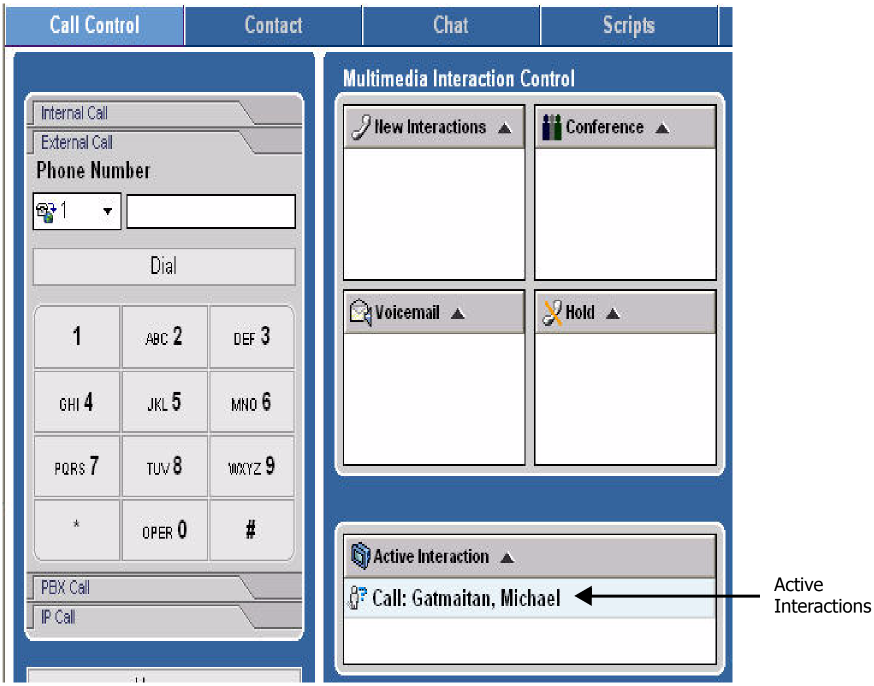


Figure 3-4 Active Interaction (Internal Call)

For information about the tools CallCenterAnywhere provides for managing telephone interactions, refer to “Handling Phone Interactions” on page 4-1.

External Calling

If you have user privileges, you can make a call outside your call center.

To Make an External Call

1. Follow these steps to call a number outside your company.

2. On the Dialer, select the **External Call** tab, select a country from the drop-down list, and type the phone number in the box (Figure 3-5).

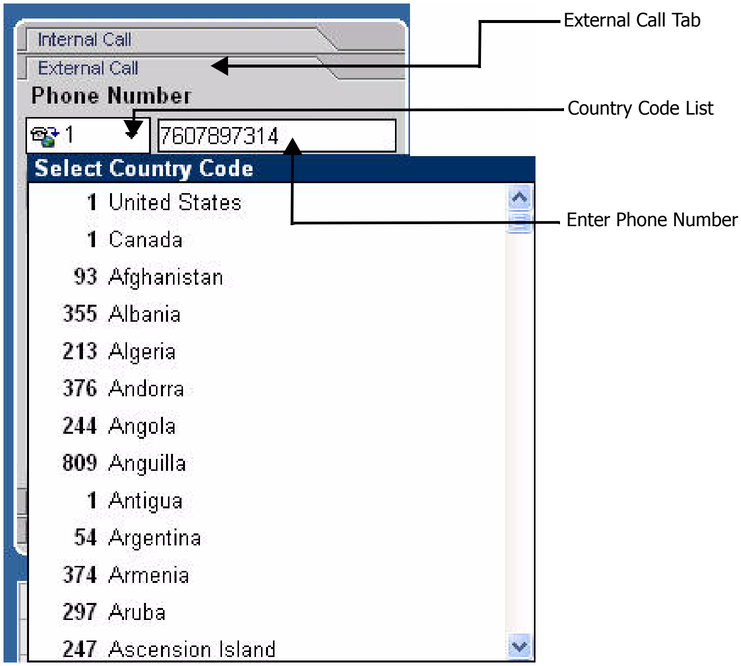


Figure 3-5 Dialer: External Call Tab

3. Click the **Dial** button. If the call must be billed to a Project, a list of Projects appears (Figure 3-6).

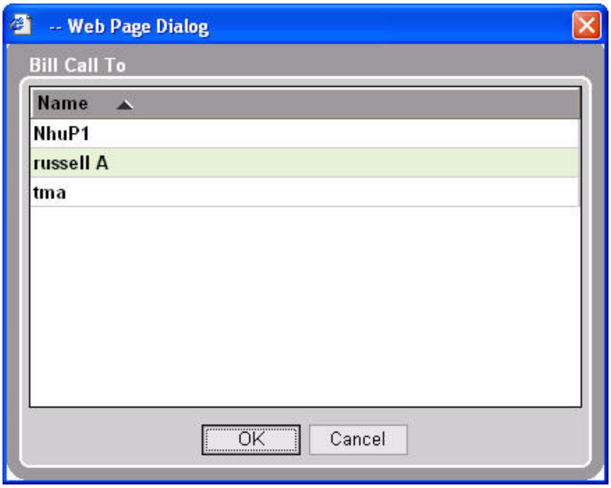


Figure 3-6 Example Bill To Project List

a. Select a **Project** for billing from the list.

To automatically bill all future calls to this Project, check **Use this project for all calls**, if available.

---

b. Click **OK**.

CallCenterAnywhere rings your extension. (Notice that the status icon changes to a ringing telephone.)

If you set your Interaction to automatically accept Interactions, your phone will not ring. The call automatically becomes the Active Interaction.

---

4. Pick up your extension and begin speaking.

Notice that the phone handset icon appears, your status changes to "Busy," and the number you dialed appears in the **Active Interaction** area (Figure 3-7).

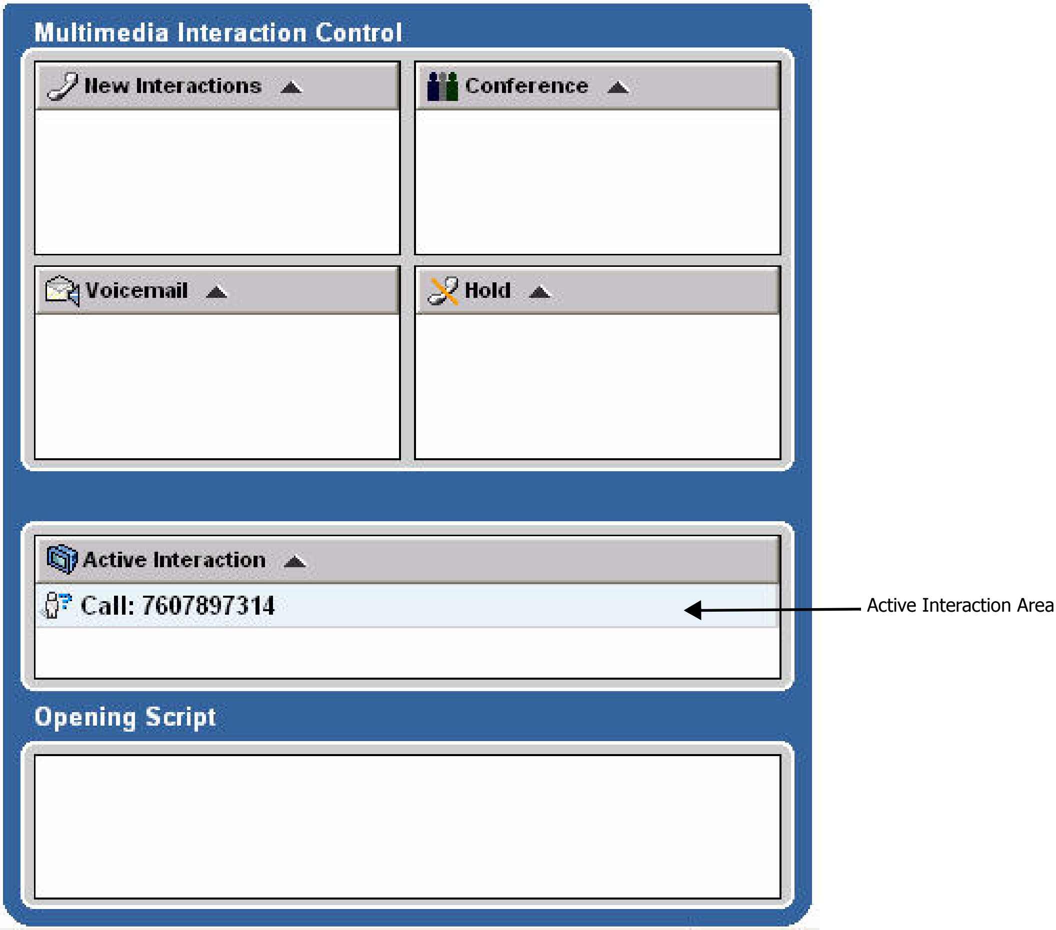


Figure 3-7 The Call Control Screen: Active Interaction Area

PBX Calling

If you have user privileges, you can make a PBX (private branch exchange) call.

To Make a PBX Call

1. On the Dialer, select the **PBX Call** tab (Figure 3-8).

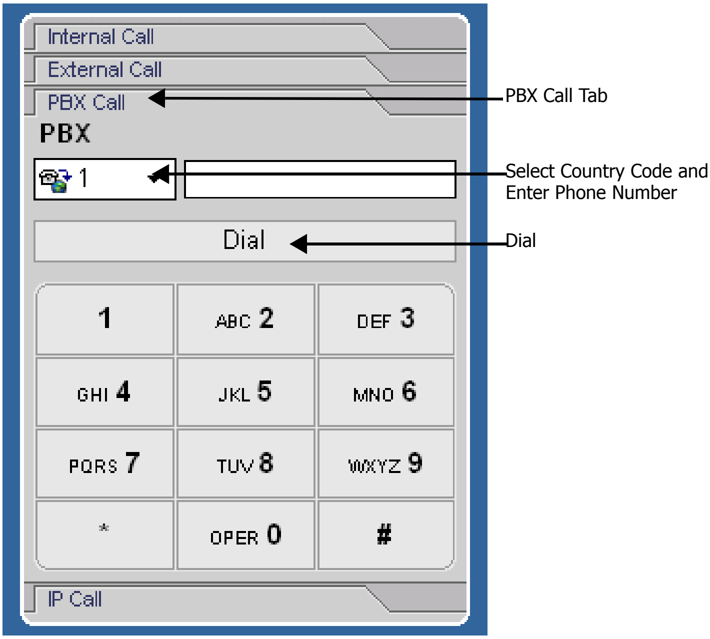


Figure 3-8 Dialer: PBX Call Tab

2. Select a Country Code from the drop down list (Figure 3-8) and type the number to call in the adjacent box.

3. Click the **Dial** button.

4. Since the call must be billed to a Project, you must first associate the call to a specific Project and then select a **Project** for billing.

To automatically bill all future calls to this Project, check **Use this project for all calls**.

5. Click **OK**.

   CallCenterAnywhere rings your extension.

If you set your Interaction to automatically accept Interactions, your phone will not ring. The call automatically becomes the Active Interaction.

6. Pick up your extension and begin speaking.

The number you dialed appears in the **Active Interaction** area (Figure 3-7 on page 3-7).

IP Calling

If you have user privileges, you can call a software phone that is installed on someone's computer.

To Make an IP Call

1. On the Dialer, select the **IP Call** tab (Figure 3-9).

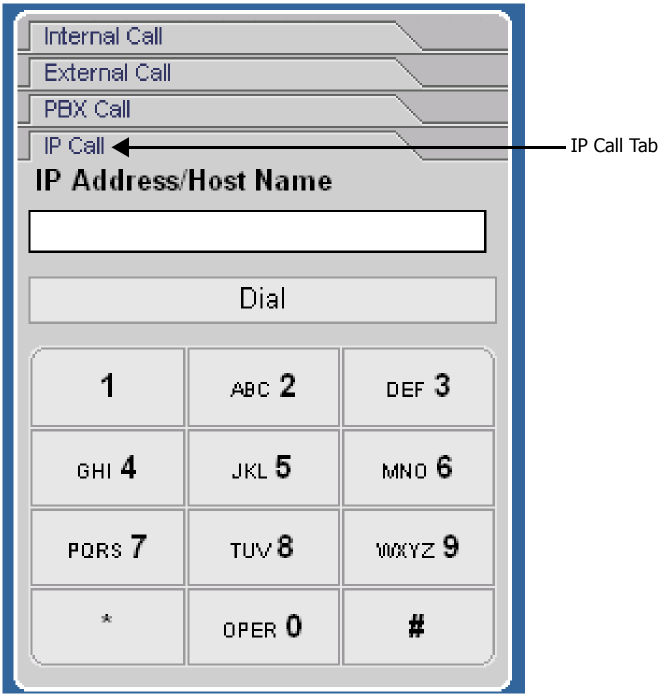


Figure 3-9 Dialer: IP Call Tab

2. Enter the IP address or the server name of the person to call.

To dial an H323 number, just enter the IP address.

To dial a SIP number, use this format:
sip:<IP Address>.

3. Click the **Dial** button.

4. Since the call must be billed to a Project, you must first associate the call to a specific Project and then select a **Project** for billing.

To automatically bill all future calls to this Project, check **Use this project for all calls**.

5. Click **OK**.

   CallCenterAnywhere rings your extension.

If you set your Interaction to automatically accept Interactions, your phone will not ring. The call automatically becomes the Active Interaction.

6. Pick up your extension and begin speaking.

The number you dialed appears in the **Active Interaction** area (Figure 3-7 on page 3-7).

To Redial a Number

No matter what kind of call you make (Internal, External, PBX, or IP), you can redial the last number by clicking the **Auto Redial** button.

The last number you dialed appears in the **Active Interaction** area as when connection completes.

Using the Company Directory

You can call anyone in your Company Directory, even if you do not know their extension.

If you are working remotely (at a location different from the call center)

1. In Call Control, click the **Connect to Server** button (Figure 3-10).

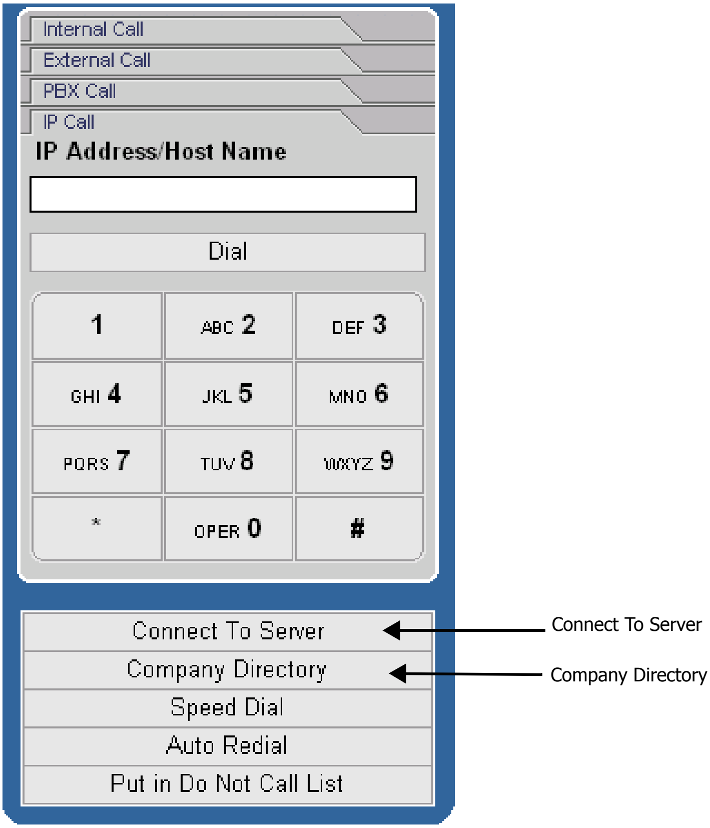


Figure 3-10 Call Control: Connect To Server Button

2. When your phone rings, pick up your hand set.

3. Click the **Company Directory** button (Figure 3-10).

If you are working locally (at the call center)

1. Click the **Company Directory** button. The Company Directory screen (Figure 3-11) opens.

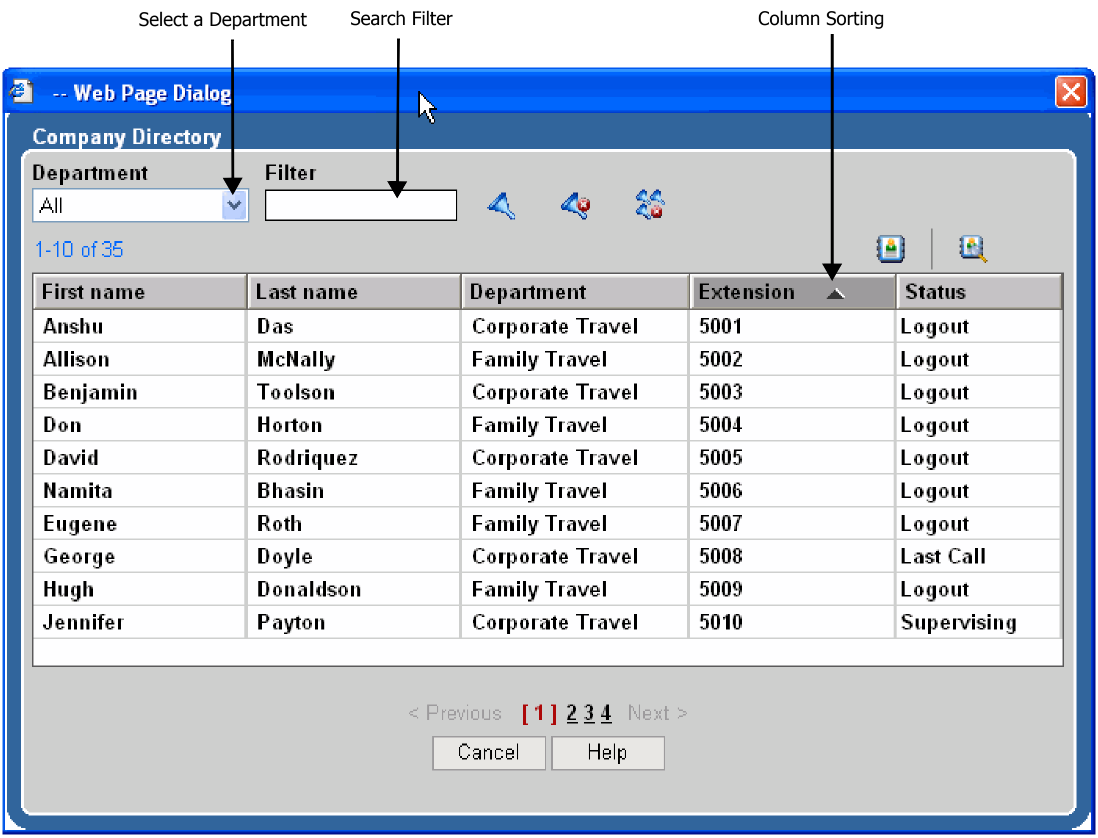


Figure 3-11 Company Directory

2. Use the **Company Directory** dialog box to find the person that you want to call.

   a. You can view people in all departments or a single department by using the **Department** list box.

   b. To quickly see a list of everyone in the company, click the **Find Contact** icon . In the Find Contact form, click the **Find** button without entering information.

c. To search for anyone in your company, click the **Find Contact** icon. In the Find Contact form, enter information about the person (such as first name, last name, or phone number) and then click the **Find** button.

d. To view a smaller list of people:

Example #1: To view only people whose last name begins with the letter 'A':

i. Click the **Last Name** column.

ii. Type **A*** in the Filter text box.

iii. Press the **Return** (or Enter) key on your keyboard.

Example #2: To see only people in the company whose phone extension ends with the number "45":

i. Click on the Extension column.

ii. Type ***45** in the Filter text box.

iii. Press the **Return** (or Enter) key on your keyboard.

3. Once you find the person to call, double-click on the person's name from the directory list.

4. Select a Project for billing.

Check **Use this project for all calls** to automatically bill all future calls to the same Project.

---

5. Click **OK**. CallCenterAnywhere rings your extension.

Notice that the **Connect To Server** button changes to **Hang Up** as the number dials.

To view someone's contact record

1. Click the **Company Directory** button and select the person's name from the Company Directory list.

2. Click the **View Contact i**con .

   Contact information appears in a new window (Figure 3-12).

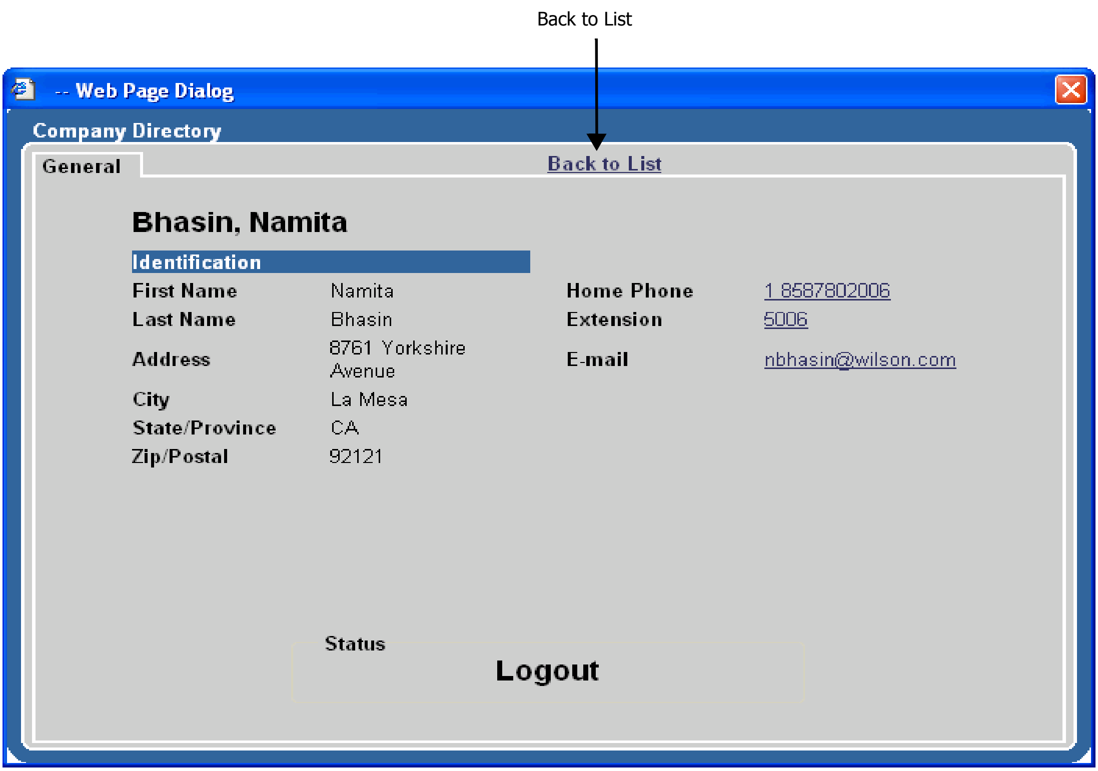


Figure 3-12 Contact Information

3. Click the **Back to List** link to return to the Company Directory list.

Handling Multiple Interactions

Most of the time, you will probably handle only one interaction at a time. However, if you need to, you can accept multiple Interactions, such as an email and a phone call but you ***must*** remember to reset your status to **Available** before CCA will offer you a new interaction.

Here's how:

1. For example, when CallCenterAnywhere offers you an email, accept as normal (see "To Accept the Email Interaction" on page 6-2).

   Notice that when a new phone interaction arrives, it appears in the banner but CCA will not present it to you as long as your status is "Busy." Your status must be "Available" before CCA will present the new interaction to you.

2. To make yourself available to accept a phone interaction, click the **Available** button (Figure 3-13).

Figure 3-13 Available Button (Personal Options)

Your status changes to Available and CCA presents the new interaction.

Handling Phone Interactions

This chapter explains how to handle phone interactions by:

- Accepting a New Phone Interaction
- Managing Callback Requests
- Redirecting a Phone Interaction (including Transferring and Conferencing)
- Recording a Caller
- Ending an Interaction

You can make and receive two basic types of phone calls using Interaction Manager:

1. **Auto Call Distribution (ACD) Calls**—where the person is not calling you directly. Instead, they dial a number associated with your Call Center and eventually the call is routed to you. ACD Calls include:

    a. A customer who calls and is routed to your phone.

    b. Web Callbacks and ACD Callbacks.

2. **Non-ACD Calls**—where the person is making a direct call to your phone number. Non-ACD calls include:

    a. Direct Inbound Calls: calls that come from outside the company directly to your phone.

    b. Direct Outbound Calls: calls that you make to numbers outside the company.

    c. Inbound/Outbound Extension calls: calls that you make to, or receive from, other extensions at your company.

Accepting a New Phone Interaction

When you receive a new phone Interaction, Interaction Manager displays the caller's phone number, if available, in the **New Interactions** area (Figure 4-1).

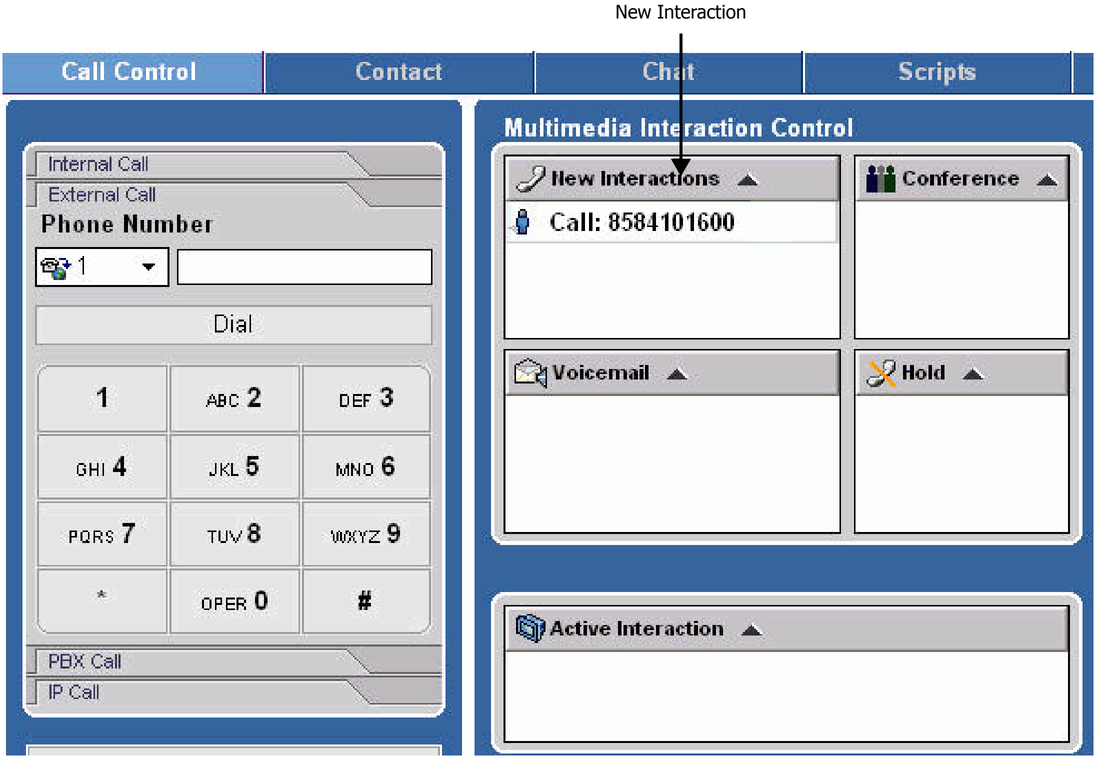


Figure 4-1 New Interactions

If you do not accept a phone Interaction before the time limit, CallCenterAnywhere changes your Status to "No Answer" and puts the Interaction back into the queue for handling by the next available Agent.

Call time limits: The number of rings set by your Administrator for Phone Interactions or one minute for ACD Callback and Web callback Interactions.

To Accept a Phone Interaction

1. Pick up your phone and begin speaking.

   Interaction Manager removes the caller's number from the **New Interactions** area and displays available information about the caller in the **Active Interaction** area.

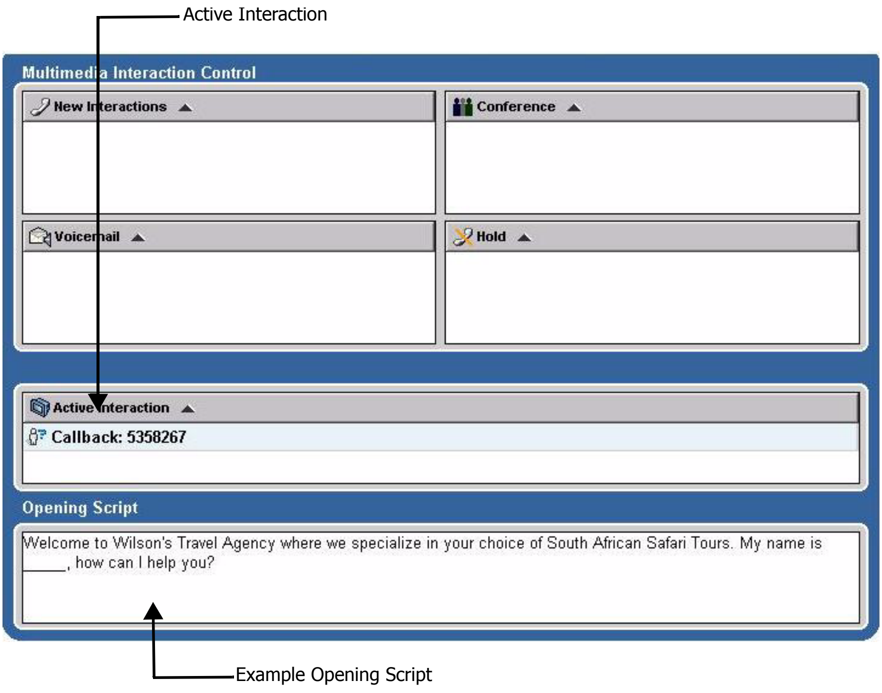


Figure 4-2 An Incoming Phone Interaction - Answered

2. Read the text in the **Opening Script** area (if your Administrator has provided an Opening Script for your Project).

   or

   From the Interaction Controls area, click **Load Script** or **Load FAQ** to display the **Scripts** screen containing the text provided by your Administrator for your Project.

   or

If this is a new customer Interaction, click **Contact** (from the interaction bar) to display the Contact Screen, where you can create and assign a Contact record to this customer.

To create a new contact, refer to "Creating a New Contact Record" on page 9-3.

To assign contacts, refer to "How Are Contacts Assigned?" on page 9-14.

To Accept Multiple Phone Interactions

Most of the time, you will probably handle only one call at a time. However, if you need to, you can accept multiple phone Interactions. Here's how:

1. When CallCenterAnywhere offers you the first call, accept it by picking up your phone or by clicking the **Accept Interaction** button (Figure 4-3).

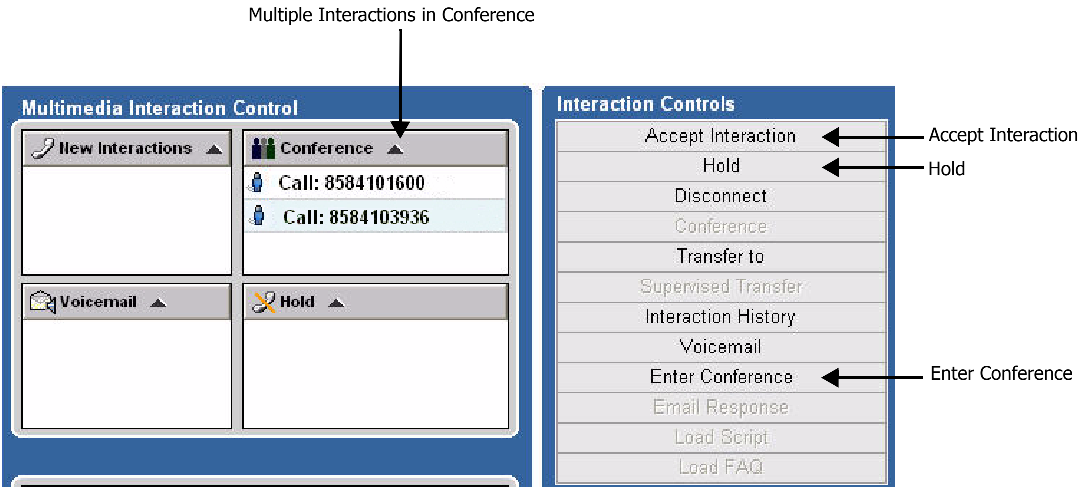


Figure 4-3 Multiple Interactions in Conference

2. "Park" the first call by putting it on Hold or in Conference.

   i. Select the call in the Active Interaction Area and then click the **Hold** or **Conference** buttons.

   or

ii. Select the call in the Active Interaction area and drag it with the mouse to the Hold or Conference areas.

3. Now, click the **Available** button (Figure 4-4).

Figure 4-4 Available Button (Personal Options)

Your status changes to Available.

4. If another customer is waiting to speak to an Agent, CallCenterAnywhere offers the call to you.

5. Click the **Accept Interaction** button to accept the second call.

Repeat these steps to accept as many phone calls as you want. For example, you can place all callers in Conference to give them the same information at the same time.

Optional Hook Flash Feature

Hook Flash is a button on a telephone that simulates a quick off-hook/on-hook/off-hook cycle. Usually the functional equivalent of quickly hanging up and lifting the receiver on an old style phone. Most modern telephones implement this as a button.

If your system is configured to use the Hook Flash feature, then you can do the following, as long as you have a MSI or HDSI phone:

- Make an extension call
- Make an outbound call.
- Retrieve voicemails.
- Place a call on hold.
- Place a call in conference.
- Transfer a call.

When you pick up the phone to make a call, a menu plays. The menu tells you the following:

> “You may dial an extension now. If you have a caller on hold, you can do a hook flash to retrieve the call. To dial out, press 9. For voicemail, press the asterisk (*) key.”

When you dial out, you must include the area code after pressing 9.

When using Hook Flash, click the **Flash** button on the phone or hang up the phone for a second.

- If you press the **Flash** button during a call, the person on the line is placed on Hold and the standard Hook Flash menu plays:

  “You may dial an extension now. If you have a caller on hold, you can do a hook flash to retrieve the call. To dial out, press 9. For voicemail, press the asterisk (*) key.”

- If you press the **Flash** button while connected to two people, the following menu plays:

  “Press 1 to connect the first held party. Press 2 to connect the second held party. Press 3 to conference the parties on hold. Press 4 to transfer connect the parties on hold.”

Managing Callback Requests

If a customer cannot reach an Agent, they can ask the system to have an Agent call them back. When an Agent becomes available, CallCenterAnywhere will automatically call the customer and connect the Agent. These types of calls are referred to as Callback Requests or Callback Interactions.

Customers can request a Callback in two ways:

1. From a Web page: When a customer completes the information on your call center's request Web page (Figure 4-5), they can specify a time they would like an agent to call them.

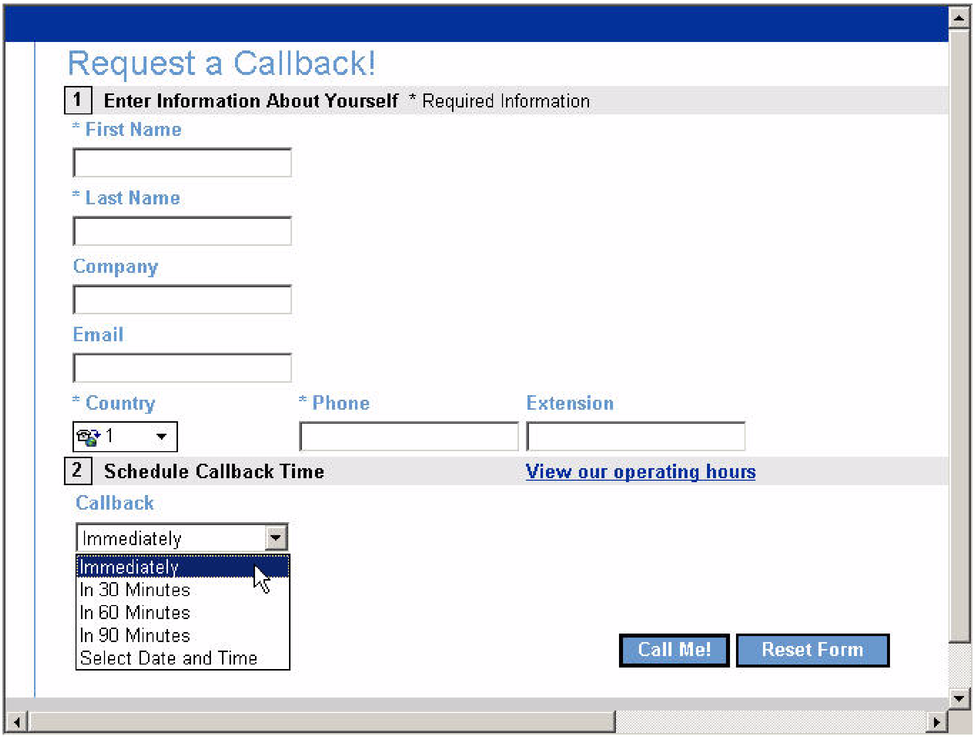


Figure 4-5 Sample Web Callback Request Page

Your Administrator must create the request Web page.

---

2. From a touch-tone menu: When the customer is waiting in a queue, they can select an option from the menu (an ACD Callback Request).

When a customer asks for a Callback using a touch-tone menu, they can only ask to be called back as soon as an Agent is available, instead of specifying a time, as on the Web page.

In each case, the customer provides a phone number where they can be reached. When an Agent becomes available:

1. CallCenterAnywhere offers the Agent the Callback Interaction.
2. If the Agent accepts the Interaction, the system dials the customer's number. Callback Interactions have the same priority as New Phone Interactions.
3. If the customer answers, the Agent handles it like any other phone Interaction. If the customer does not answer, the Agent can reschedule the Callback for another time.

To Display Callback Request Information

When CallCenterAnywhere offers you a Callback Interaction, **Web Callback** or **Callback** appears in the **New Interactions** area (Figure 4-6).

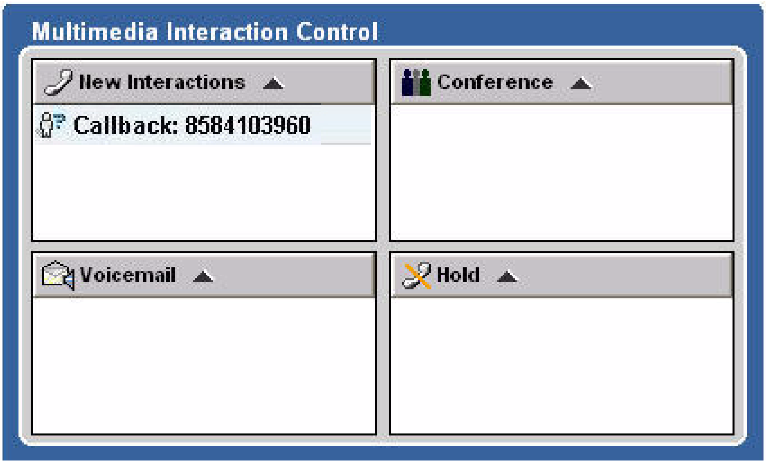


Figure 4-6 Web Callback - New Interaction

Interaction Manager displays all the information it has about the Callback Request in the main banner area and Detailed Information area (Figure 4-7).

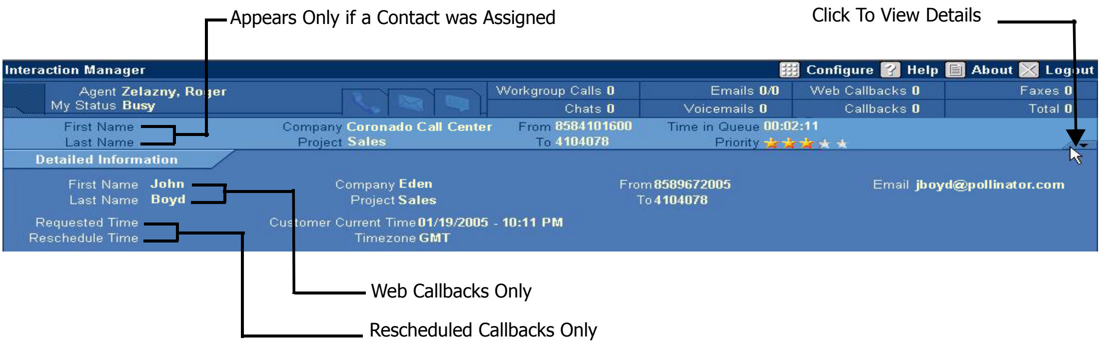


Figure 4-7 Web Callback - Detailed Information

a. If a Contact was assigned (see Chapter 9, "Managing Contacts") the customer's first name and last name appear in the main banner area.

b. If the Interaction is a Web Callback, and the customer filled out the fields of the Web Callback form, that information appears in the Detailed Information area.

c. If the Interaction is a re-scheduled Callback request:

   i. The time that the customer requested the Callback is appears under **Requested Time**.

   ii. The time that CallCenterAnywhere scheduled the Callback appears under **Scheduled Time**.

To Accept a Callback Request

1. Click **Accept Interaction,** or select the Callback request and drag it to the **Active Interaction** area.

   CallCenterAnywhere automatically dials the number provided by the customer.

2. Wait for your phone to ring.

3. Pick up your phone and then:

   a. If the customer answers the phone, begin speaking.

   b. If the customer does not answer, click **Disconnect**, and go to "To Reschedule a Callback Request".

To Reschedule a Callback Request

Customers can request a callback from an Agent either on the Company Web site (Web callback) or in response to a menu played while the customer waited in a queue (ACD Callback). If the customer does not answer the callback, you can reschedule the callback for a later time.

1. Click **Disconnect**.

   The Outcome dialog box (Figure 4-8) appears.

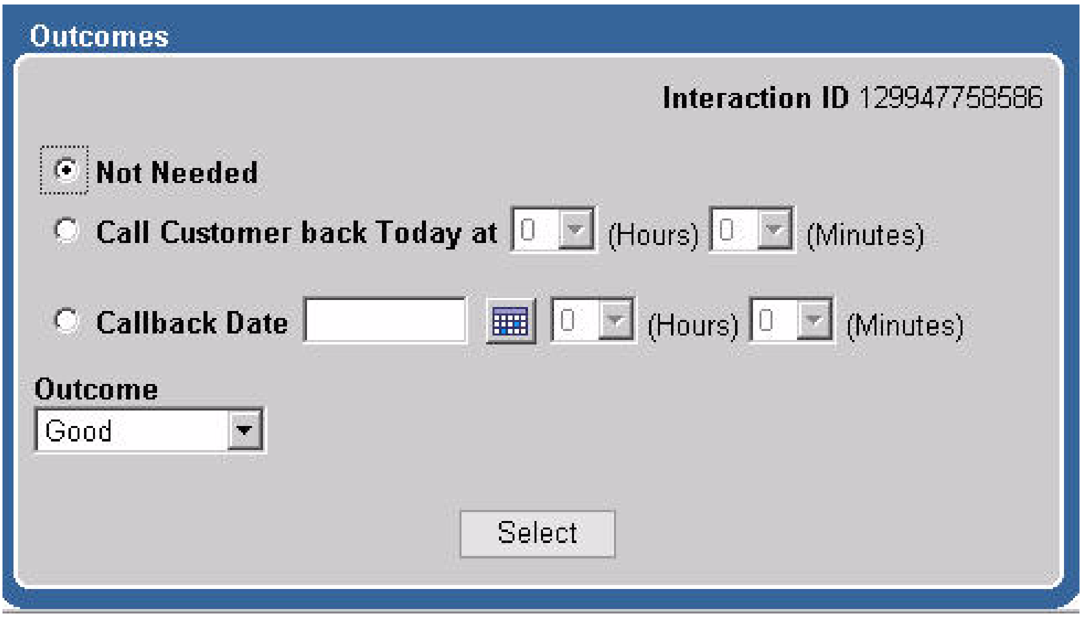


Figure 4-8 Outcome Dialog Box

2. Select the day and time to re-schedule the Callback. (See Table 4-1.)

3. Select an Outcome from the drop-down list. (See Table 4-1.)

4. Click the **Select** button.

   CallCenterAnywhere calls the customer back at the date and time you specify.

Table 4-1 explains each of the options available on the Outcome dialog box.

Table 4-1 Outcome Rescheduling Options

Choose...	To...
Not Needed	Record an outcome for this Interaction without rescheduling a callback.
Call Customer Back Today at	Reschedule the callback for later today. Choose the hour and minute to call back the customer. CallCenterAnywhere calls the customer at the time you specify and routes the Interaction to an available Agent.
Callback Date	Reschedule the callback for a future time. Click  to choose the day to call back the customer, and then choose the hour and minute in the adjacent boxes. CallCenterAnywhere calls the customer at the time you specify and routes the Interaction to an available Agent.
Outcome	Your Administrator can create a list of Outcomes to describe the result of a call or callback. Your Administrator can also make it **optional** or **required** for you to select an Outcome. See your Supervisor or Administrator for more information.

Redirecting a Phone Interaction

Interaction Manager has several ways to direct the caller after accepting the Interaction. You can:

- Place a Caller on Hold
- Transferring a Caller (to a Workgroup, external phone number, another Agent, or to your voicemail)
- Sending a Caller to Conference

Place a Caller on Hold

To Place the Active Call on Hold

You can place an active call on hold while you handle other Interactions. (See “To Accept Multiple Phone Interactions” on page 4-4.)

Click **Hold**. Interaction Manager displays the caller’s number in the **Hold** area.

If you are not handling another phone Interaction, Interaction Manager rings your phone at regular intervals to remind you that you have a caller on hold.

To Resume Speaking with a Caller on Hold—

1. Click the name or number of the caller in the **Hold** area.
2. Click **Accept Interaction**.
3. If necessary, pick up your phone when it rings.
4. Begin speaking to the caller.

Transferring a Caller

You can transfer a call to a Workgroup, to another Agent in the call center, to an outside line, or directly to the voicemail system.

To Perform a Supervised Transfer

A Supervised Transfer lets you speak to the person who will receive the call before you make the transfer. That way, you can give the receiving party information they may need before taking the call

1. Place the caller on hold (refer to "To Place the Active Call on Hold" on page 4-12).

2. Dial the person who will receive the call.

   For example, use the dialer to call their number (See "To Make an External Call" on page 3-2.). When the call connects, click the **Accept Interaction** button.

3. Tell the person that you about to transfer a call and provide any other useful information about the caller.

4. From the Multimedia Interaction Control area, select the caller to transfer.

5. From the Interaction Controls area, click the **Supervised Transfer** button.

CallCenterAnywhere connects the caller to the person receiving the transfer, and disconnects you from the Interaction.

To Perform an Unsupervised Transfer

Perform an unsupervised transfer when you do not need to speak to the person who will receive the transfer.

Unless the call *must* be handled by a specific Agent, send unsupervised transfers to a Workgroup. If you transfer a call to a specific Agent and that Agent is unavailable, CallCenterAnywhere sends the caller to the Agent's voicemail, which may not meet the customer's needs.

To Transfer a call to a Workgroup, Another Agent, or an Outside Line

1. From the Interaction Controls area, click the **Transfer to** button. The Transfer dialog box (Figure 4-9) opens.

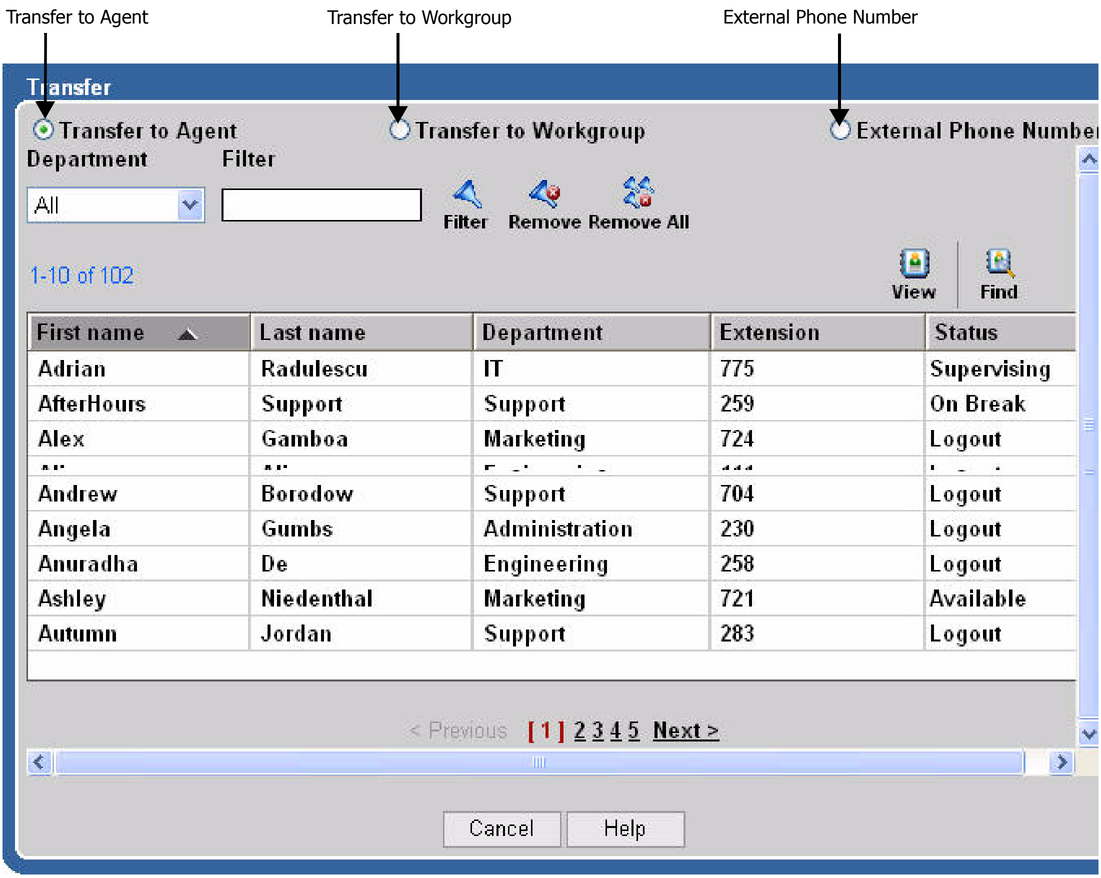


Figure 4-9 Transfer Dialog Box

2. To transfer the call to an Agent:

   a. Click the **Transfer to Agent** radio button and then double-click the name of the Agent who will receive the call.

   or

   b. Click once on the Agent name and then click the **Transfer to Agent** radio button.

or

c. Click once on the Agent name and then click the View Contact icon  (or the Find Contact  icon) to retrieve the Agent’s Contact Record.

Then, when the Contact Record appears, transfer the call by clicking on the Agent’s extension number.

3. To transfer the call to a Workgroup:

a. Click the **Transfer to Workgroup** radio button.

b. Double-click the Workgroup that will receive the call.

4. To transfer the call to a external phone number:

a. Click the **External Phone Number** radio button. The External Phone Number dialog box (Figure 4-10) opens.

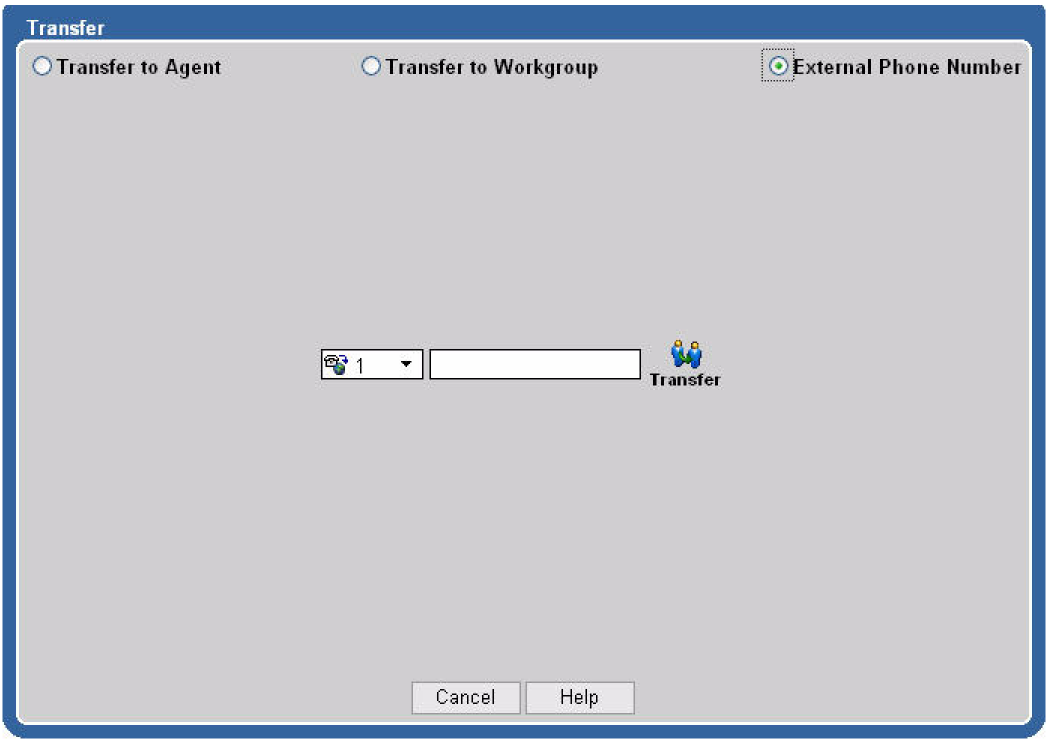


Figure 4-10 External Phone Number Dialog Box

b. Select a country code from the list box and enter the external phone number in the adjacent box.

c. Click the **Transfer** icon .

To Transfer a Caller to Your Voicemail

1. From the Interactions Controls area, click the Voicemail button.

   or

2. In the New Interactions area, click the caller's name or number.

3. Click and drag the name from the New Interactions area to the Voicemail area.

   CallCenterAnywhere prompts the caller to leave a voicemail message.

Sending a Caller to Conference

You can direct callers to a conference where several people can communicate simultaneously. Once you have created a conference, you can exit the conference to answer other calls, then return to the conference, or exit permanently while the other participants continue speaking.

Before you can create a conference, you must have one Active Interaction.

To Create a Conference

1. Accept the Interaction (see "Accepting a New Phone Interaction" on page 4-1). (Notice that Interaction Manager displays available information about the caller in the **Active Interaction** area.)

2. Click **Conference** or drag the name in the Active Interaction area to the Conference area (Figure 4-11).

   You are now in a conference with the caller.

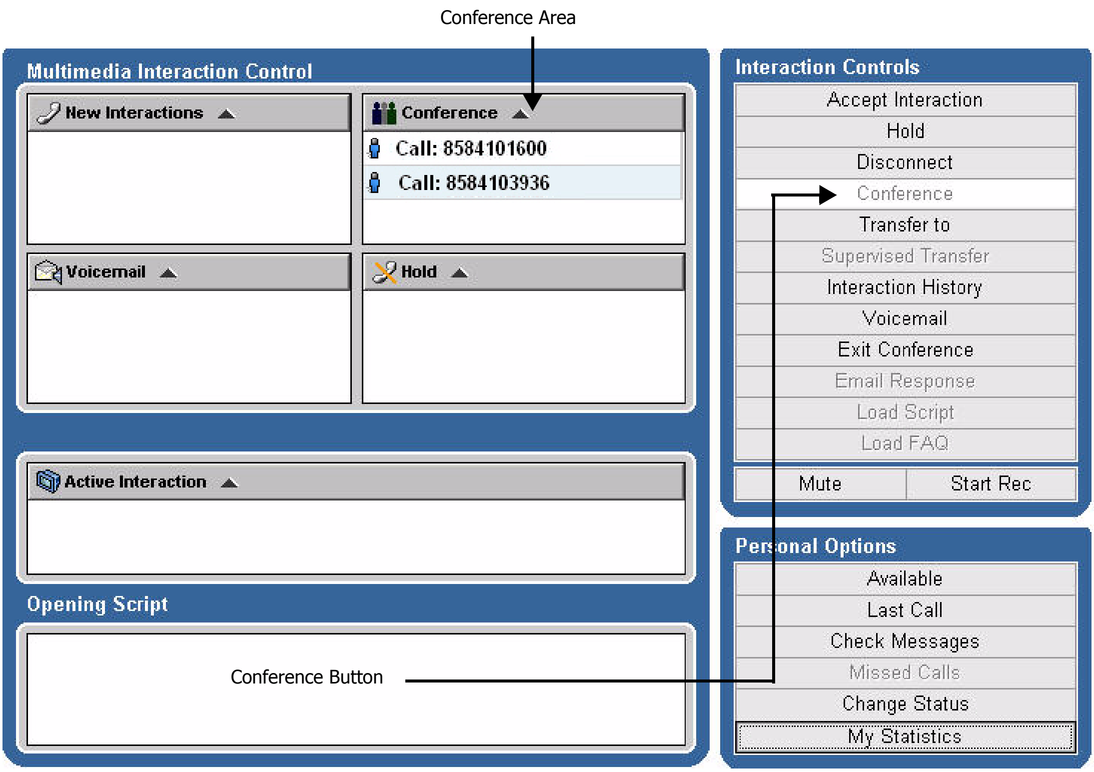


Figure 4-11 Two Callers in a Conference

All conference participants can hear each other while they remain in the conference.

3. Add other callers to the conference. For example:

   a. Dial another number and when the call connects, accept the interaction.

   b. Select the name or number of the new call and then click the **Conference** button (from the Interaction Controls area).

See also "To Accept Multiple Phone Interactions" on page 4-4.

To Exit From a Conference

You can exit a conference, leaving the remaining participants to continue talking to each other.

1. From the Interaction Controls area, click the **Exit Conference** button

   The callers still participating in the conference still appear in the **Conference** area.

2. After exiting the conference, click the **Available** button so you can accept new calls. See “To Accept Multiple Phone Interactions” on page 4-4.

To Re-enter a Conference

If you have exited an existing conference for any reason, you can re-enter the conference by clicking the **Enter Conference** button (from the Interaction Controls area).

To Remove a Caller From a Conference

You can remove a caller from a conference, while allowing other participants to continue speaking.

1. In the Conference area, select the caller to remove.

2. Click **Hold** to place the caller on hold (or click **Disconnect** from the Interaction Controls area). If you placed the caller on hold, the caller will hear the hold recording (if any), and cannot participate in the conference.

To Re-Invite a Caller Back to a Conference

You can invite the caller back to the conference by:

1. In the Hold area, select the caller.

2. Click **Conference** from the Interaction Controls area.

If you disconnected the caller, they are removed from the conference and from the call center. The remaining people are not affected and can continue their conference.

To Mute Your Workstation

You can mute your workstation so that the caller cannot hear you, but you can still hear the caller.

1. From the Interaction Controls area, click the **Mute** button.

   The caller hears silence, unless they are participating in a conference. Conference participants can still hear each other, but no callers can hear you.

The **Mute** button changes to **Unmute**.

---

2. Click the **Unmute** button to turn off muting.

Recording a Caller

If configured, Interaction Manager lets you record any Interaction. Recordings are saved in a database and are useful in documenting a caller's responses or consent.

If not configured, you must first create a Contact record for the caller and assign the Interaction to the Contact record. See page 9-3 for information on creating a Contact record for a caller.

To Record a Caller

1. Make sure that call recording is allowed by law in your area.

2. If required by law, notify the caller that you are recording the conversation.

3. Click **Start Rec** on the Interactions Control group.

   The **Start Rec** button changes to **Stop Rec**, indicating that you are recording the call.

4. Click **Stop Rec** to stop recording the call, or end the Interaction.

Interaction Manager saves the recording in the database. See "To Listen to a Recorded Interaction" on page 9-22 for information on playing back a previously recorded Interaction.

Ending an Interaction

There are two ways to end a phone Interaction:

- Hang up your phone
- Enabling Malicious Call Trace
- Disconnect from the caller

Hanging Up

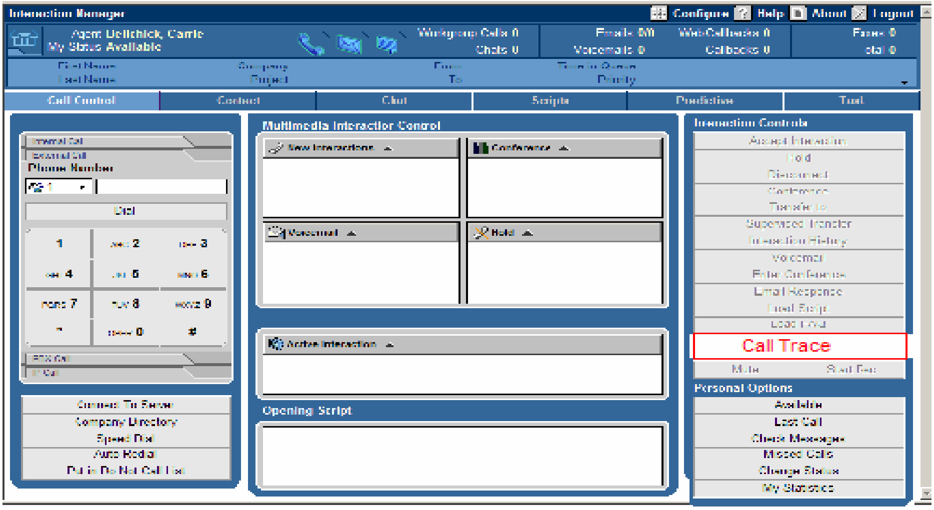
If you use a phone extension at your workstation, (you are not using a VOIP headset), and you have only one caller, you can simply hang up your phone to end the Interaction. Alternatively, you can click **Hang Up.**

Selecting the **Hang Up** button does not disconnect interactions that are on hold or in conference.

Enabling Malicious Call Trace

CCA lets Agent initiate a Malicious Call Trace (MCT) to allow the carrier to resolve Life Threatening and Unwelcome Call issues, as defined by Australian Law.

To Enable Call Trace



1. When the agent clicks the Call Trace Button, an "Are you sure?" dialog box should pop up and acknowledgement gained before activating the trace.

While the Call Trace is active, the Button should appear in Red. Upon OK, the button name should change to "Call Trace Initiated". When the SNMP Trap is Sent and acknowledged, the button should change to "Call Trace Complete". This status will remain until the call is disconnected. Upon disconnect, the button will return to non-active "Call Trace".

Disconnecting

If you have multiple callers in your call control screen, you can select one caller and disconnect only that caller without hanging up your phone.

To Disconnect a Caller

1. Click the caller to disconnect on the call control screen.
2. Click **Disconnect**.

The caller is disconnected and removed from your call control screen.

3. You can resume an Interaction with another caller by clicking the caller's interaction and clicking **Accept Interaction**, or by selecting the caller and dragging the **New Interaction** icon to the **Active Interaction** control.

Assigning Outcomes

An Outcome describes the result of an Interaction, such as "Sale," "Request for Literature," "Request for Product Change," and so forth. Your Administrator creates a list of outcomes that are customized for your call center.

Outcomes are an optional feature of CallCenterAnywhere. Your Administrator may decide not to use them, but can also require you to select an Outcome at the end of every Interaction.

See your Supervisor or Administrator if you are not sure how Outcomes are used in your call center.

If your call center uses Outcomes, the Outcome dialog box (Figure 4-12) opens when the Interaction ends.

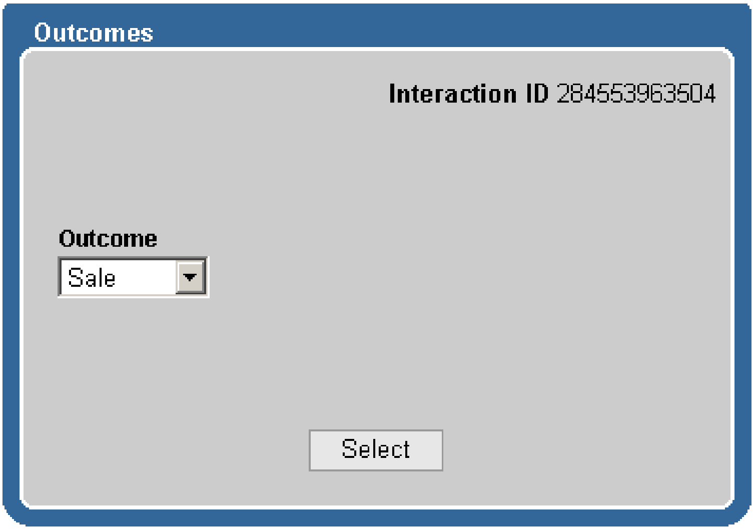


Figure 4-12 Outcome Dialog Box

1. Select the Outcome that best describes the result of the Interaction from the drop-down list.

2. Then, click the **Select** button.

Handling Chat Interactions

Web based chat is a fast, cost-effective way to provide immediate, live assistance to internet customers. This chapter discusses the Interaction Manager tools for handling chat requests coming into the Contact center and for providing service to your chat-based customers.

Accepting a New Chat Interaction

When you receive a new Chat Interaction, Interaction Manager notifies you by displaying the Call Control screen or by playing a sound (see “Notification Mode (for New Interactions)” on page 2-5). Interaction Manager also displays the customer’s name (if they entered one in the Chat form) in the **New Interactions** area.

If you do not accept a new Chat Interaction within 60 seconds, CallCenterAnywhere sets your status to “No Answer” and places the Interaction back into the queue for handling the next available Agent.

If you already accepted a Chat Interaction, make yourself available to accept a Phone Interaction by clicking the **Available** button on the Call Control tab.

To Accept the Chat

1. Click the customer's name in the **New Interactions** area.

2. Click **Accept Interaction** on the Interaction controls, or select the chat and drag the **New Interaction** icon to the **Active Interaction** area.

   Interaction Manager displays the Chat Screen (Figure 5-1).

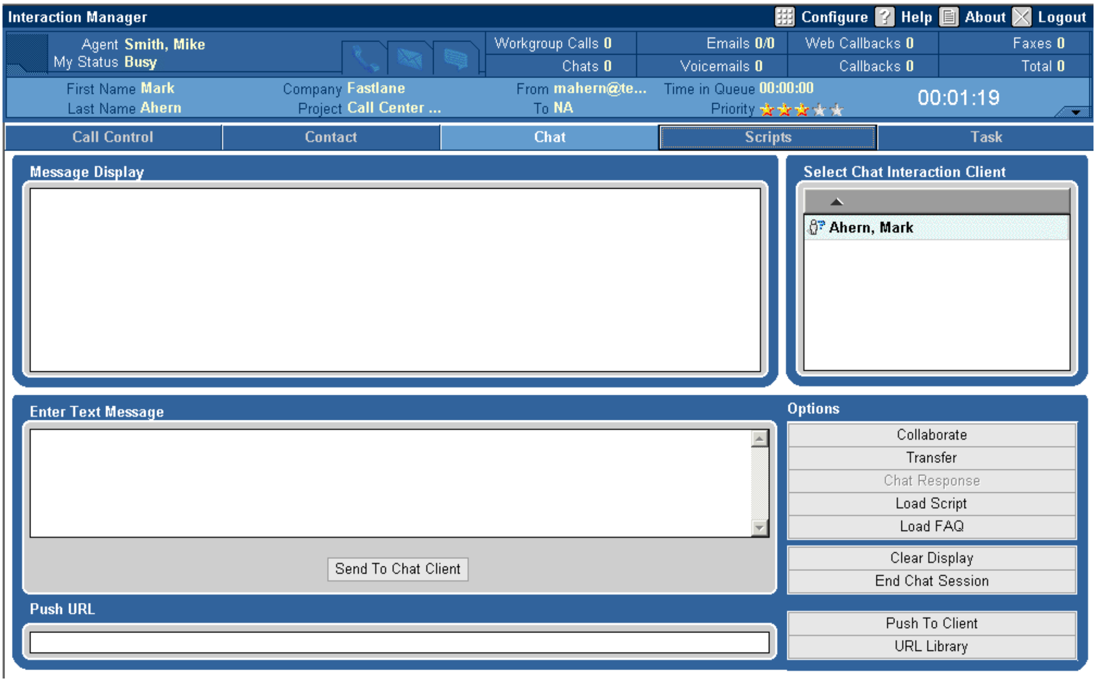


Figure 5-1 The Chat Screen

3. If your Administrator provided a Script (or FAQ content) for the Chat Project, click the **Script** (or **FAQ**) buttons in the Options to display them.

   a. If your Administrator has not provided Script or FAQ content for the Chat Project, these buttons appear grey.

   b. After you click the Script (or FAQ) button, the information loads into the Scripts tab.

4. To send information from the Script or FAQ to the customer:

    a. Click the **Scripts** tab.

    b. Copy the information from the Script (or FAQ). How you do this depends on your operating system, but usually you can select text with the mouse, bring up a pop-up menu, and choose **Copy**.

    c. Click the **Chat** tab and paste your text.

    d. Click the **Send to Chat Client** button.

5. To send your chat message to the customer:

    a. Paste or type your message in the **Enter Text Message** box.

    b. Click **Send To Chat Client** (or press **Enter**).

    Your message appears in the **Message Display** text (Figure 5-2) box.

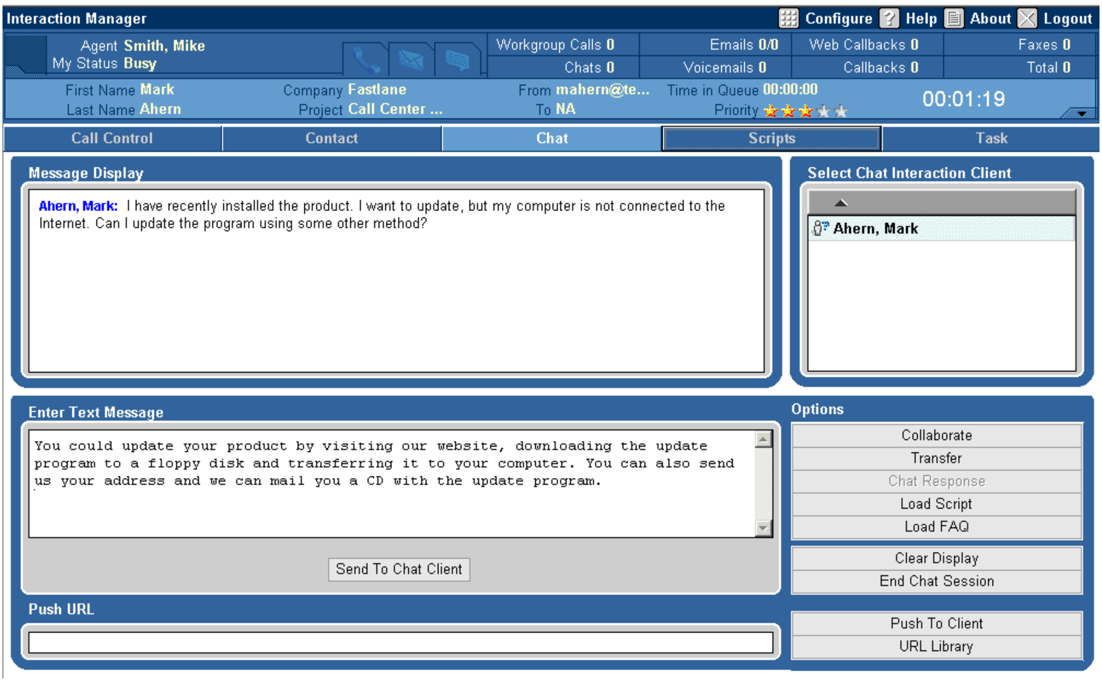


Figure 5-2 Example Chatting With a Customer

Sending Prepared Content to a Chat Customer

You can use the Chat screen to send helpful content supplied by your Administrator to the customer. Interaction Manager lets you send content from:

- Intelligent Chat Template Response Library
- Web site links from the URL Library

If your Administrator has developed Intelligent Chat Templates or a compiled a collection of helpful web pages, you can quickly access this information for sending to the customer.

To Send Content from the Intelligent Chat Response Library

1. Accept the Incoming Chat Interaction (refer to “Accepting a New Chat Interaction” on page 5-1).
2. In the **Message Display** area, highlight the text to search for in the Intelligent Chat Response Library provided by your Administrator.
3. Click **Chat Response**.

   If your Administrator set up Intelligent Chat Response Templates, Interaction Manager displays the **Chat Response** dialog box (Figure 5-3), listing each template with a relevance score (higher score indicates that the highlighted text contained a greater number of Intelligent Chat template keywords).

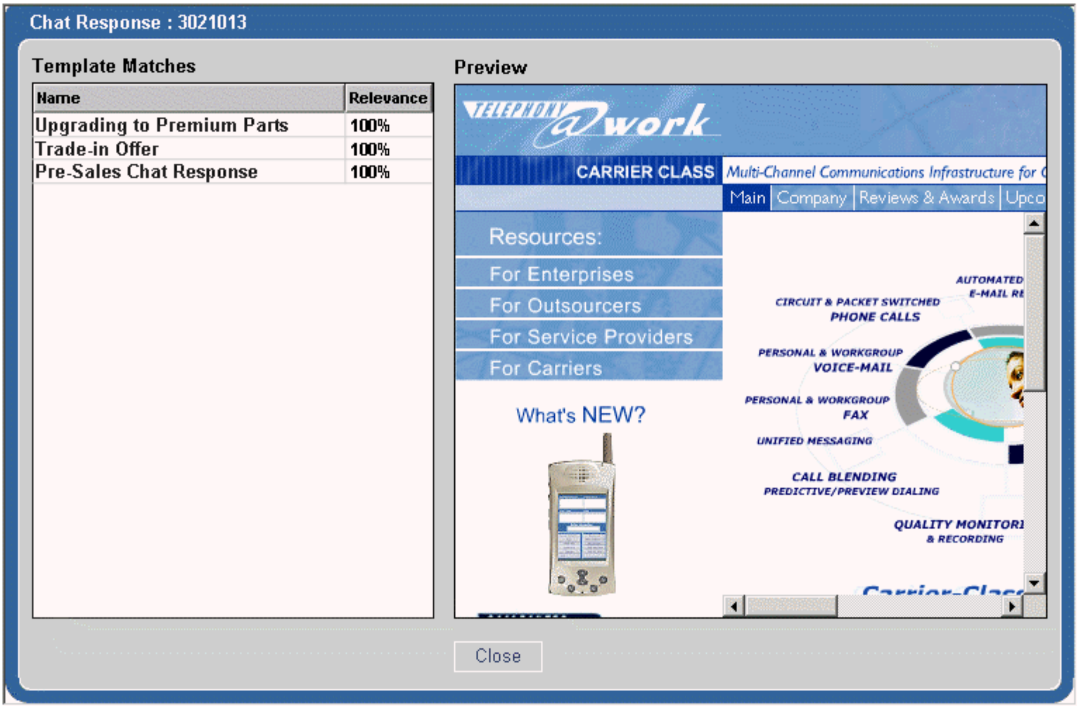


Figure 5-3 Chat Response Templates and Preview

4. Click a template name to display that template's content in the **Preview** pane.

5. Copy the information from the template. How you do this depends on your operating system, but usually you can select text with the mouse, bring up a pop-up menu, and choose **Copy**.

6. Paste the content into the **Enter Text Message** area of the Chat Screen.

7. Click **Send to Chat Client** (or press **Enter**).

To Send a Web Site Link (URL) to a Customer

1. Select the customer that you want to chat with in the **Select Chat Interaction Client** control.

2. Enter the address in the **Push URL** text box (you do not need to type "http://" before the address).

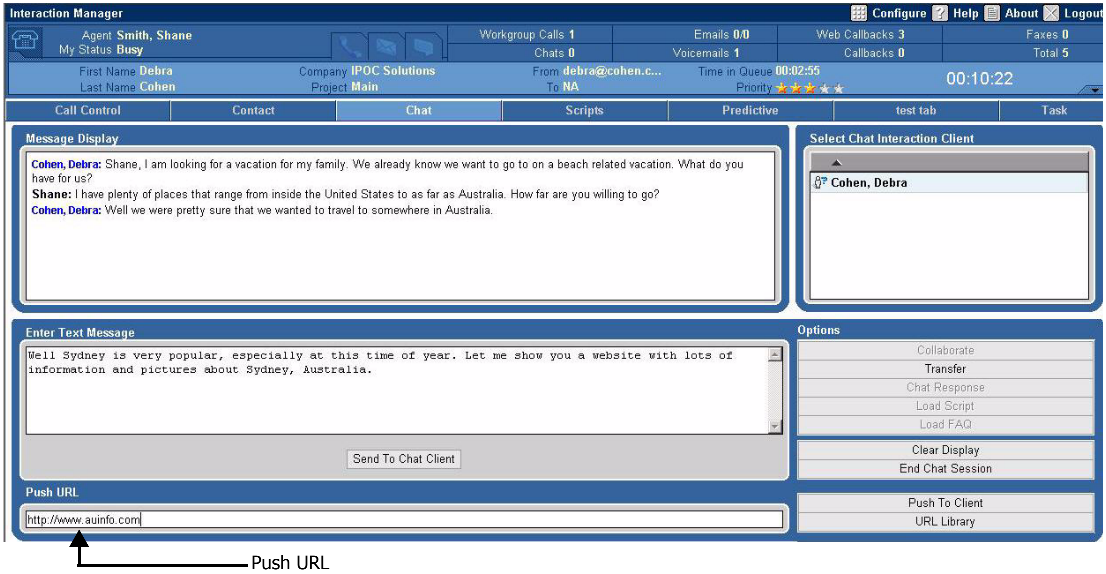


Figure 5-4 Example of Pushing a URL

3. Click **Push To Client**. The website you sent the customer appears on the customer's screen.

The customer must have a recent version of either Internet Explorer or Netscape Navigator installed on their computer.

To Send a Web Site Link from the URL Library to the Customer

Your Administrator may have set up one or more Web pages that can be useful to your customer. To make one of these Web pages appear on the customer's screen without typing the URL address in the Push URL text box:

1. Select the customer to chat with in the **Select Chat Interaction Client** control.

2. Click the **URL Library** button in the Options area.

3. Click a **Push Library Name** and click **Select** (or you can double-click on the library entry). The Web page appears on the customer's screen.

Collaboration

Collaboration means that you and your customer can view and change the same Web page. For example, you can make a Web page appear on the customer's chat screen, you can see that Web page, enter text in a text box, click on list boxes, and so forth. The customer sees your changes and you can see changes that your customer makes. The Collaboration features lets you help your customer navigate a website or fill out Web-based forms.

Notes on Collaboration

The collaboration feature assumes that both Agents and customers have their Internet Explorer **security settings** at default levels for both the local Intranet and the Internet.

- The Internet Explorer default setting for the Local Intranet is **Medium-Low**.
- The Internet Explorer default setting for the Internet is **Medium**.

To change your Internet Explorer security settings

1. Start Internet Explorer.
2. From the Tools menu, select **Internet Explorer**.
3. In the Internet Options menu, click the **Security** tab.
4. Click the **Internet** icon and then click the **Default** button.

Collaboration only works for Web pages that the customer views through their Chat screen. If the customer opened a browser by themselves, you cannot see it.

To Use Collaboration

1. Select the customer to chat with in the **Select Chat Interaction Client** control.
2. Send a text message to the customer, alerting them that you are going to remotely control their browser.

3. Click **Collaborate.**

   Interaction Manager displays the customer's screen in the resulting window.

4. Complete the task for the customer and close the browser window.

Transferring a Chat to Another Workgroup or Agent

You can transfer a customer chat to another Workgroup or Agent, or to a Supervisor working on the Project.

To Transfer a Chat

1. Select the customer to chat with in the **Select Chat Interaction Client** control.

2. Click **Transfer**. The Transfer dialog box appears.

3. Double-click on the name of an Agent and then click the **Cancel** button to close the Transfer dialog box.

   a. CallCenterAnywhere removes the Chat Interaction from your Interaction Manager.

   b. If the Agent accepts the transferred Chat, Interaction Manager sends a transcript of your previous communication with the customer to the Agent.

   c. If the Agent is unavailable to accept the Chat Interaction, CallCenterAnywhere transfers the customer back to you.

Ending a Chat Session

When you finish chatting with a customer, end the session so that Interaction Manager can save the Interaction in the Contact database and update your Interaction statistics.

CallCenterAnywhere can only save the Interaction to the database if you have assigned a Contact to the customer. See "How Are Contacts Assigned?" on page 9-14.

To End a Chat Session

1. Select the customer to chat with in the **Select Chat Interaction Client** control.
2. Send a message to the customer indicating your are finished chatting.
3. Click **End Chat Session**.

Handling Email Interactions

Customers contact CallCenterAnywhere Agents by email. Interaction Manager integrates with your email program so you can respond to customer's email messages. This chapter discusses the Interaction Manager tools for handling email Interactions coming into the call center.

Accepting a New Email Interaction

- When you receive a new email Interaction, Interaction Manager notifies you by displaying the Call Control screen or by playing a sound (see "Notification Mode (for New Interactions)" on page 2-5).

- Interaction Manager also displays the sender's email address in the **New Interactions** area.

- Interaction Manager also displays the Contact's name in the **New Interactions** area, if there is a Contact record in the CallCenterAnywhere database associated with the email header information.

If you do not accept a new email Interaction within five minutes, CallCenterAnywhere sets your status to "No Answer" and places the Interaction back into the queue for the next available Agent.

To Accept the Email Interaction

1. Select the email in the **New Interactions** area.

2. Click **Accept Interaction** on the Interaction controls area, or select the email and drag the **New Interaction** icon to the **Active Interaction** area.

Interaction Manager displays available information about the customer in the **Active Interaction** area, and launches your email client.

If you have already accepted an Email Interaction, you *must* change your status to Available before CCA will present any additional interactions. Do this by clicking the **Available** button on the Call Control tab.

To Accept Multiple Interactions

Most of the time, you will probably handle only one interaction at a time. However, if you need to, you can accept multiple Interactions, such as an email and a phone call. Here’s how:

1. When CallCenterAnywhere offers you an email, accept it as normal (see “To Accept the Email Interaction” on page 6-2).

   Notice that when a new phone interaction arrives, it appears in the banner but CCA will not present it to you as long as your status is “Busy.” Your status must be “Available” before CCA will present the new interaction to you.

2. To make yourself available to accept a phone interaction, click the **Available** button (Figure 6-1).

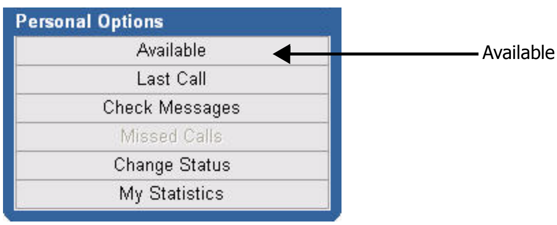


Figure 6-1 Available Button (Personal Options)

   Your status changes to Available and CCA presents the new interaction.

Responding to Email

It is important to respond to email messages routed to you by CallCenterAnywhere. If you accept an email Interaction, but do not reply to the Interaction within the time allotted by your Administrator, CallCenterAnywhere places the Interaction back into the queue for the next available Agent.

If you attempt to reply to the accepted email after the time limit has elapsed, or after another Agent replies to the same email, CallCenterAnywhere does not deliver your reply to the customer.

To Respond to an Email Interaction

1. Accept the email Interaction or click **Check Messages**. CallCenterAnywhere launches your email client program.

2. If a Contact record was not assigned to this customer, create and assign the Contact record now (see “Creating a New Contact Record” on page 9-3).

To save the Interaction History for this Interaction, you must assign a Contact record *before* you send your response. (If a Contact record does not exist for the email customer, CallCenterAnywhere cannot save the current Interaction History in the History records for the customer.)

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3. If your Administrator has supplied a script, click **Load Script** or **Load FAQ** on the **Call Control** Screen.

4. If you want, you can copy some of the Script or FAQ material into your email response to the customer.

5. If your Administrator has set up Intelligent Email Templates, click **Email Response** in the **Interaction Controls** area of the Call Control screen to see a list of recommended responses. Each Intelligent email template created by your Administrator appears with a confidence score (higher score indicates that the customer’s email contained a greater number of Intelligent email template keywords).

    a. Click the Intelligent email template name to view the content of each template.

    b. Copy the displayed content of the Intelligent email template.

c. Switch to your email application and paste the copied content into the body of your message.

6. Send your email to the customer.

When drafting your response, remember that customers are writing to a Project email address (such as techsupport@acme.com) and not to you personally. Your return address, which is sent to the customer, is also the Project email address, not your personal email address.

Discarding Email

If you decide that an email Interaction does not require a response, you can discard the email. When you discard an email Interaction, CallCenterAnywhere removes it from your Interaction Manager without sending a response to the customer. However, CallCenterAnywhere stores the content of the customer's email for later review by your Administrator.

To Discard an Email Interaction

1. Make the email Interaction that you want to discard the Active Interaction.

2. Click **Disconnect** in the Interaction Controls area.

   a. If your Administrator does not require you to supply an outcome for each Interaction:

      i. CallCenterAnywhere displays the **Discard email** dialog box (Figure 6-2).

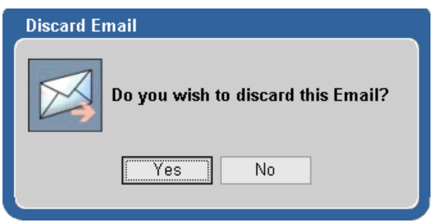

Figure 6-2 Discard Email Dialog Box

ii. Click **Yes** to discard the email.

If you select **No**, CCA will NOT remove the email from Interaction Manager. It remains connected to the interaction and CCA places the Interaction back into the queue for the next available Agent.

---

b. If your Administrator requires you to supply an outcome for each Interaction:

i. CallCenterAnywhere displays the Outcome dialog box (Figure 6-3).

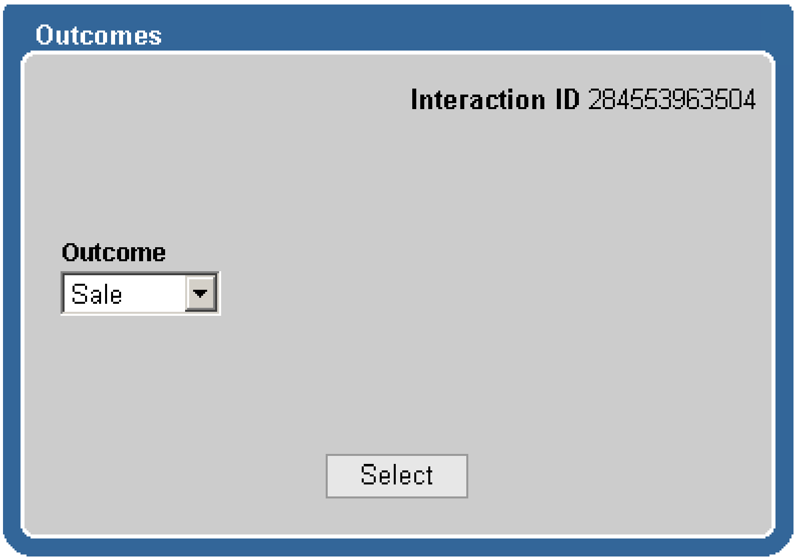

Figure 6-3 Outcome Dialog Box

ii. Select an Outcome from the list box and click **Select**.

Handling Predictive Interactions

Predictive Calling is an optional feature of CallCenterAnywhere. The Predictive Screen is available only if the feature is configured on your system.

In Predictive Calling the system automatically dials a series of phone numbers of existing customers or potential customers. If a customer answers the phone, they are connected to an Agent who will usually read a prepared script. The most common use for Predictive Calling is to offer products and services to new or existing customers.

While you are handling a Predictive Interaction, CallCenterAnywhere does not route incoming Phone Project calls to you.

Logging Into a Predictive Project

If you are ready to accept Interactions generated by a Predictive Project, access the Predictive Screen (Figure 7-1) to log into the Project.

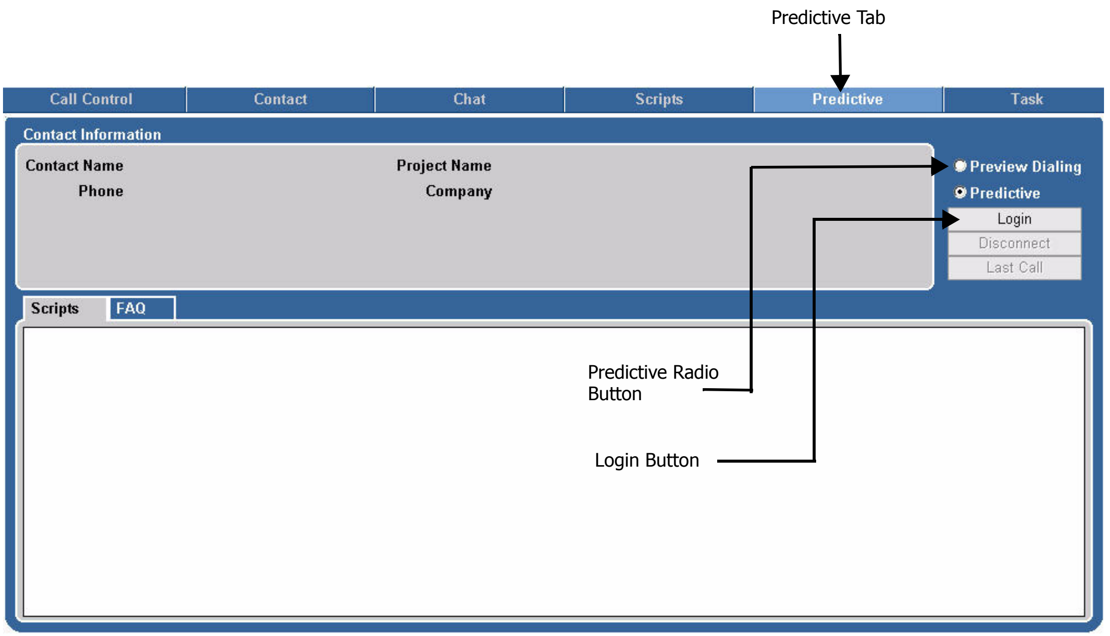

Figure 7-1 The Predictive Screen

To Log in to a Predictive Project

1. Click the **Predictive** tab to open the Predictive Screen.
2. Click the **Predictive** radio button. The Login button appears.
3. Click the **Login** button. CallCenterAnywhere routes Predictive Interactions to you.

To Log Out of a Predictive Project

1. Click the **Logout** button (formerly the Login button). CallCenterAnywhere stops routing Predictive Interactions to you.

Handling a Predictive Interaction

When your Administrator starts a Predictive Project, the system starts dialing the numbers of prospective customers. If a prospective customer answers their phone, CallCenterAnywhere rings your extension.

To Handle a Predictive Interaction

1. Pick up your phone handset when it rings.

   Interaction Manager displays the prospective customer's name, phone number, and company name on the Predictive Screen.

2. Read the text in the **Opening Script** area (if your Administrator has provided an Opening Script for your Project).

3. Click **Load Script** or **Load FAQ** to display the **Scripts** screen containing text provided by your Administrator for your Project.

4. If the customer asks you not to call them again, you can remove their phone number from the calling list by:

   a. Click the Call Control Tab.

   b. Clicking the **Put in Do Not Call List** button (located in the lower left, under the Dialer).

      CallCenterAnywhere will not dial the customer's number again during Predictive or Preview calling.

5. When you finish the Interaction, hang up your phone, or click the **Call Control** tab and click the **Disconnect** button (from the Interaction Controls area).

6. If your company uses Outcomes, the **Outcomes** dialog box appears. See Figure 8-2 on page 8-3 for more information.

Put in Do Not Call List

There may be times when a customer requests that your call center not call them again. When this happens, add their telephone number to the Do Not Call List.

The Do Not Call List only applies to Predictive calling projects.

To place a customer's phone number on the Do Not Call List

1. While speaking with the customer, click the **Put on Do Not Call List** button (Figure 7-2), in the Call Control tab.

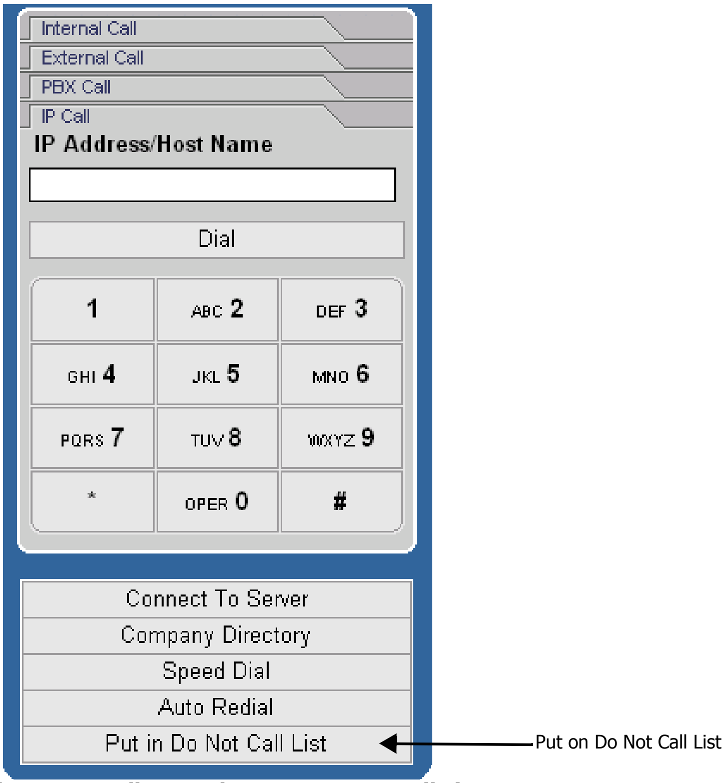

Figure 7-2 Call Control: Put on Do Not Call List Button

2. The Add Phone Number to include in Do Not Call List box (Figure 7-3) appears.

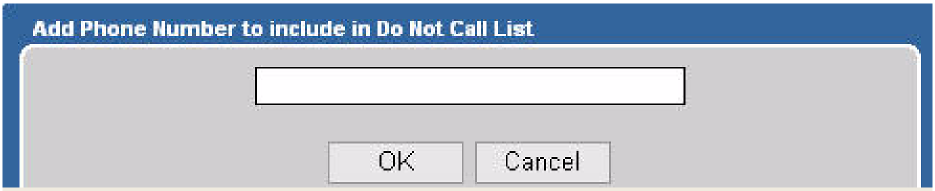

Figure 7-3 Add Phone Number to Include in Do Not Call List Dialog Box

3. Type the phone number in the text box.

Be careful to type the number correctly, since you cannot correct it later.

---

4. Click **OK**.

Now, when your Administrator runs the Clean List tool, the number is added to the Predictive Dialer so that CCA will no longer automatically dial the number during a Predictive project.

Handling Preview Interactions

Preview Calling is an optional feature of CallCenterAnywhere. The Preview Screen is available only if the feature is configured for your company.

In Preview Calling, like Predictive Calling, potential customers are called and offered new products and services. The difference between Predictive and Preview Calling is the way that the number is dialed:

- In Predictive Calling, the system automatically calls a number. If a customer answers the phone, the system routes the customer to an available Agent.

- In Preview Calling, the Agent tells the system to dial a customer number, and then waits for the customer to answer.

While you are handling a Preview Interaction, CallCenterAnywhere will not route Project phone calls to you.

To Make Preview Calls

1. Click the **Predictive** tab.

2. The Preview Screen (Figure 8-1) opens.

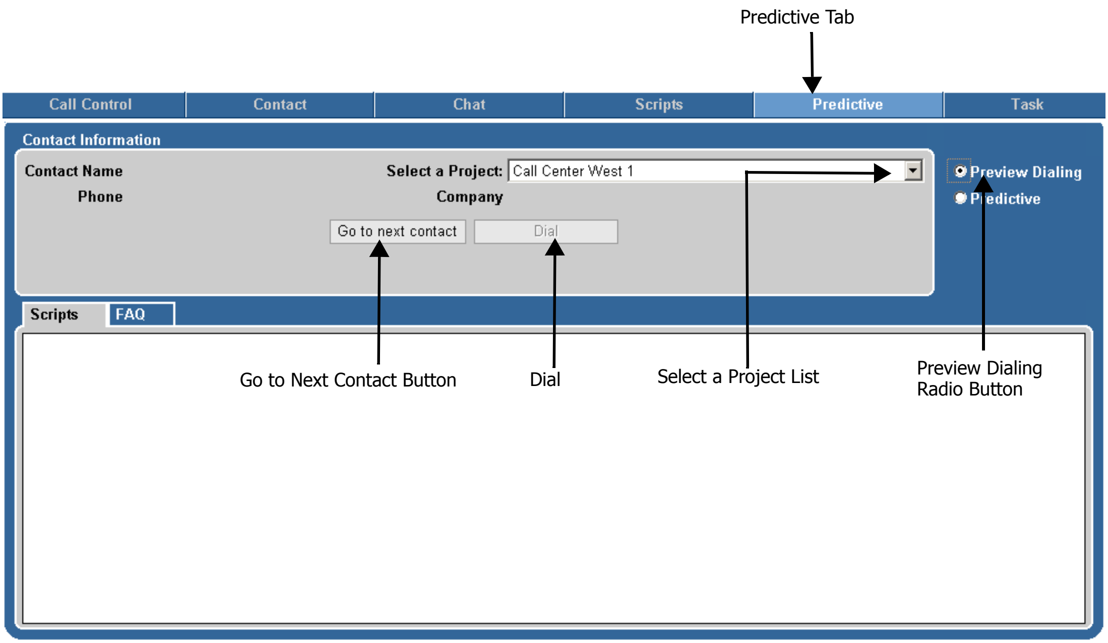

Figure 8-1 The Preview Screen

3. Click the **Preview Dialing** radio button.

4. Select a Project from the **Select a Project** list box.

   If your Administrator created a script for Preview Calling, it appears in the **Script** area.

5. Click **Go to next Contact**.

   CallCenterAnywhere displays a prospective customer's name and number on your screen.

6. Click the **Dial** button.

   CallCenterAnywhere rings your extension.

7. Pick up your extension and begin speaking.

8. If the customer asks you not to call them again, you can remove their phone number from the calling list by:

    a. Click the **Call Control** tab.

    b. Click the **Put in Do Not Call List** button (located in the lower left, under the Dialer).

       CallCenterAnywhere will not dial the customer's number again during Predictive or Preview calling.

9. When you finish the Interaction, hang up your phone, or click the **Call Control** tab and click the **Disconnect** button (under Interaction Controls).

   CallCenterAnywhere displays the **Outcome** dialog box (Figure 8-2).

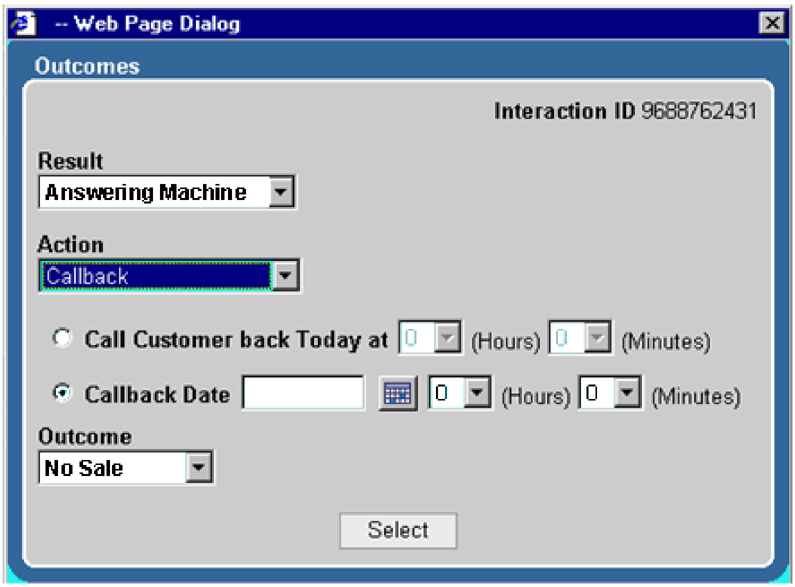

Figure 8-2 Outcomes Dialog Box

The Outcomes feature is optional and may not be available at your company.

---

10. Select a **Result** from the drop-down list. Table 8-1 explains the available Result options.

Table 8-1. Outcome Result Options

Result	Description
Answering Machine	The call was picked up by an answering machine.
Invalid Entry	The number was an invalid phone number. Choosing this result removes the number from the Preview calling list so that CallCenterAnywhere will not provide it to Agents to call again.
Busy	The customer’s phone line is busy.
Fax	The number led to a Fax machine. Choosing this result removes the number from the Preview calling list so that CallCenterAnywhere will not provide it to Agents to call again.
Answered	The customer answered the phone. Choosing this result removes the number from the Preview calling list so that CallCenterAnywhere will not provide it to Agents to call again.
No Answer	The customer’s phone rang, but was not picked up by a person or an answering machine. Choosing this result keeps the number on the Preview calling list.

11. Select an **Action** from the drop-down list. Table 8-2 explains the available Action options.

Table 8-2. Outcome Action Options

Action	Description
None	No action is needed.
Add to Do Not Call List	Choosing this result removes the number from the Preview calling list so that CallCenterAnywhere will not provide it to Agents to call again.
Callback	Call the customer back at a certain day and time. **Note**: Callbacks for Predictive and Preview calls work differently than they do for regular ACD calls. • When you schedule an ACD Callback (after the customer calls your company and is routed to you) the system automatically calls the customer at the right time and then connects the customer to an Agent. • When you schedule a Callback for a Predictive or Preview call, the system will try to call every number in the current dialer list before it tries the Callback number. (A dialer list is the list of Predictive or Preview phone numbers that the system is currently working on.)

Table 8-2. Outcome Action Options

Action	Description
	If there are a lot of numbers in the current dialer list, it's possible that the Callback won't be dialed at the time you set in the Outcome dialog box.
Personal Callback	When you choose Personal Callback, the system adds a new task to your Task tab. When the time for the Callback arrives, Interaction Manager opens a reminder dialog box on your machine with the customer's name and phone number.

12. To schedule a call back, select Callback from the Action drop-down list (as described above) and then:

    a. To call back later today: Select the time (hours and minutes) from the drop-down list.

       CallCenterAnyshere attempts to call every number in the current dialer list before it tries the Callback number. (A dialer list is the list of Predictive or Preview phone numbers CCA is currently using.)

       If there are a lot of numbers in the current dialer list, it is possible that the Callback won't be dialed at the time you set in the Outcome dialog box.

    b. To call back another day: Enter a date (or select one from the calendar icon) and then select the time (hours and minutes) from the drop-down list.

13. Click the **Select** button.

Managing Contacts

A Contact can be anyone who has ever reached your call center. Usually they are your customers. You can use the Contact tab in Interaction Manager to create **Contact records**. The Contact record contains information such as the customer's name, address, phone number and email address, but can also contain notes.

When you accept an Interaction from a customer, you can *assign* (or link) the customer to a Contact record to display all of the information that was previously recorded about that customer. This gives you some familiarity with the customer and their previous activity or issues.

Features of the Contact Main Screen

Figure 9-2 shows the Contact screen with its Contact Information list box and various Agent options icons.

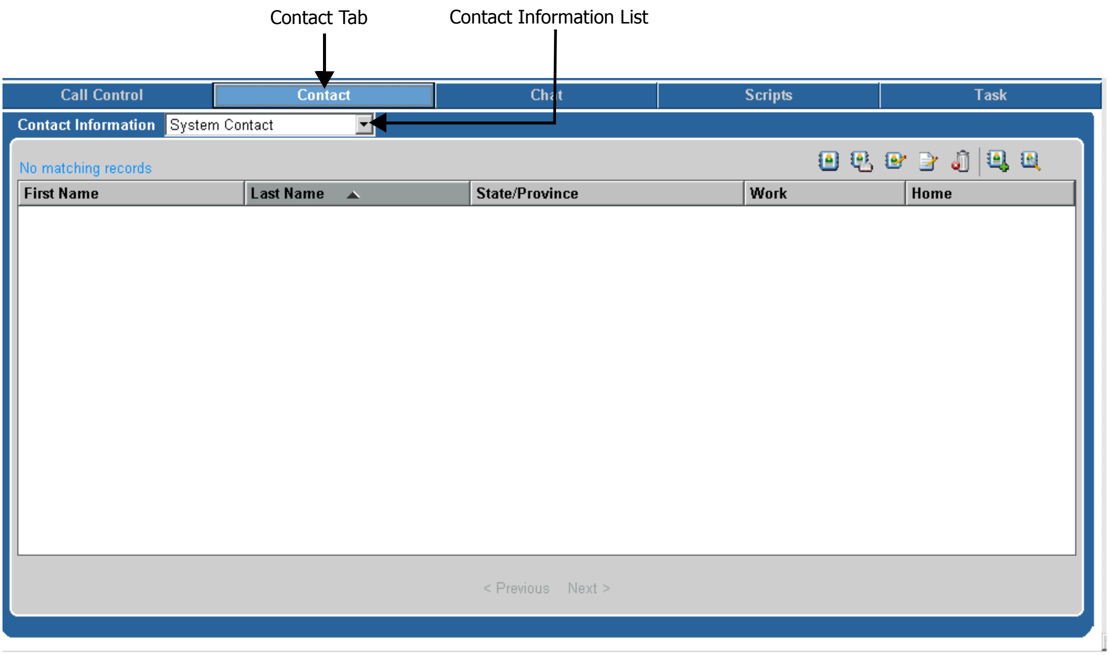

Figure 9-1 Contact Main Screen

The Contact Information List Box

In previous versions of Interaction Manager all contacts were kept in a single list. Now, your call center can have multiple lists that are created by your administrator.

Having multiple contact lists means you can separate contacts by category. For example, you could have a contact list for domestic customers and another contact list for customers in other countries.

Ask your administrator how contacts are configured for your call center.

Agent Options Icons

The Agent Option icons (Table 9-1) give you access to all of the Contact features. However your administrator can configure the system to remove some of these features, so you may not see all of the icons listed below.

In addition, the list of icons that you see can change depending on which contact list you have selected in the **Contact Information** list box. Your administrator may give you access to some features for one contact list, but may not give you access to that feature for a different contact list. Ask your administrator for more information.

Table 9-1. Agent Icons

Click...	To...
	View the currently selected contact.
	View the contact history for the currently selected contact.
	Edit the contact history for the currently selected contact.
	Add a note for the currently selected contact.
	Delete the currently selected contact.
	Add a new contact record.
	Search for contacts in the current contact list.

Creating a New Contact Record

1. After logging into Interaction Manager, click the **Contact** tab to open the Contact Screen (Figure 9-1 on page 9-2).

2. From the **Contact Information** list box, select your desired contact list.

3. Click the **Add Contact** icon. 

Your Administrator may not allow you to create contacts. If you don't see the Add Contact button, contact your Administrator.

The **Add Contact** screen (Figure 9-2) appears.

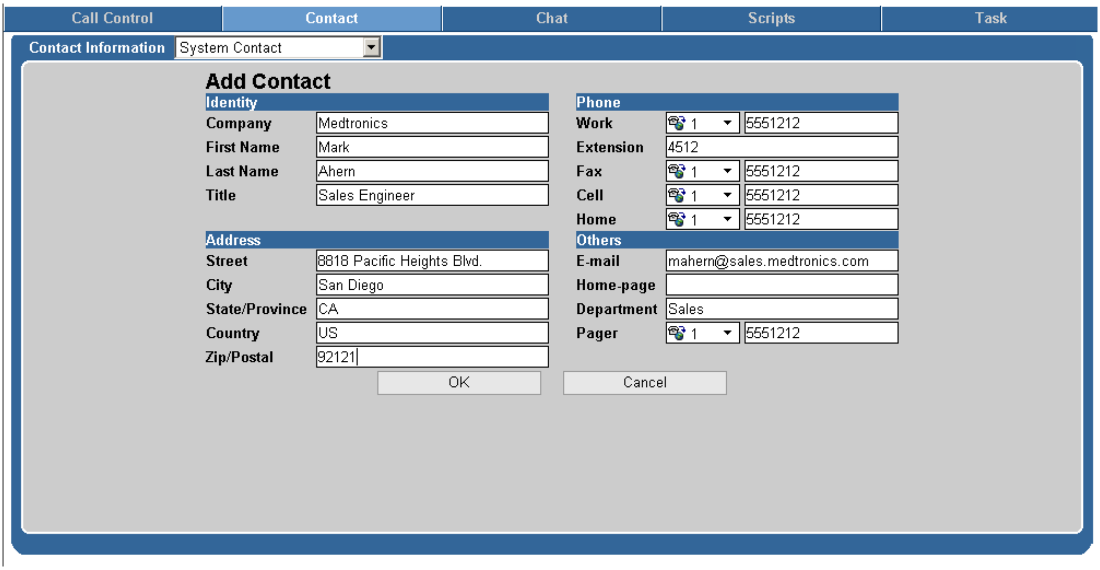

Figure 9-2 Add Contact Screen

Because the Add Contact screen can be customized by an Administrator, your screen may look different from the example in Figure 9-2.

4. Fill out the fields with information you gather from the customer.

Your Administrator can make some of the fields required.

5. Click **OK** to save your changes (or **Cancel** to close without saving any changes).

Editing a Contact Record

1. Click the **Contact** tab to open the Contact Screen (Figure 9-1 on page 9-2).

2. From the **Contact Information** list box, select the contact list containing the contact to edit.

   a. To learn how to search for contacts, see “Finding Contact Records” on page 9-7

      or

   b. To quickly see all contacts in the current Contact list:

      i. Click the **Find** Contact icon.

      ii. In the **Find Contact** screen, click the **Find** button without entering data into any of the fields.

3. Select the contact to edit.

4. Click the **Edit Contact** icon. 

Your Administrator may not allow you to edit contacts. If you don’t see the Edit Contact button, contact your Administrator.

If you have permissions to edit contacts, you can also right-click on the contact and choose **Edit Contact** from the pop-up menu.

The **Edit Contact** screen (Figure 9-3) appears.

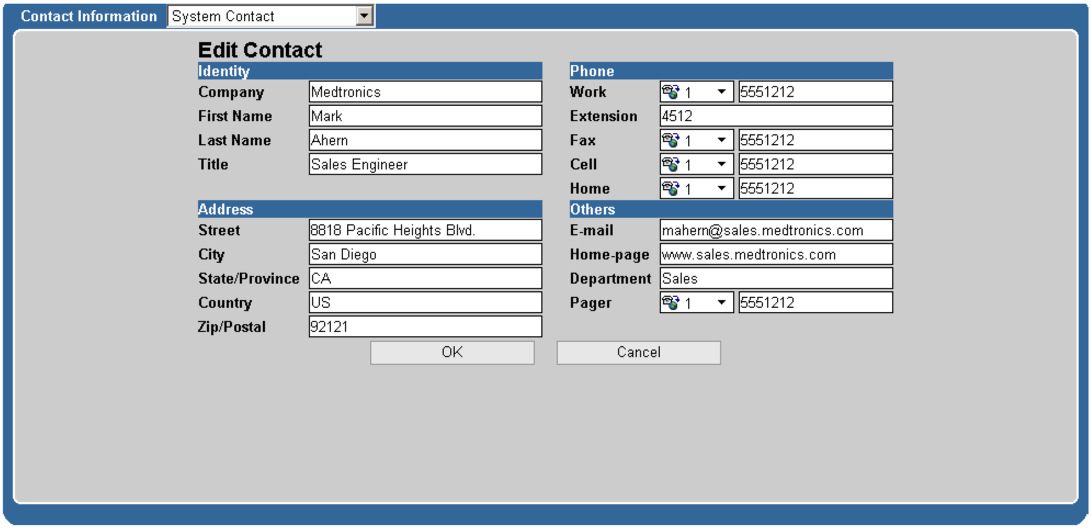

Figure 9-3 Example Edit Contact Screen

Because the Edit Contact screen can be customized by an Administrator, your screen may look different from the example in Figure 9-3.

---

5. Modify the data in any of the fields.

6. When you are done, click **OK** to save your changes (or **Cancel** to discard any changes).

Deleting a Contact Record

1. After you login to Interaction Manager, click the **Contact** tab to open the Contact Screen (Figure 9-1 on page 9-2).

2. From the **Contact Information** list box, select the contact list containing the contact to delete.

a. To learn how to search for contacts, see “Finding Contact Records” on page 9-7

or

b. To quickly see all contacts in the current Contact list:

i. Click the **Find** Contact icon.

ii. In the **Find Contact** screen, click the **Find** button without entering data into any of the fields.

3. Select the contact that you want to delete.

4. Click the **Delete Contact** icon. 

or

You can also right-click on the contact and choose **Delete Contact** from the pop-up menu.

Finding Contact Records

To Quickly Find All Contacts in a Contact List

1. Click the **Contact** tab to open the Contact Screen (Figure 9-1 on page 9-2).

2. From the **Contact Information** list box, select the contact list in which to search.

3. Click the **Find** Contact icon. 

The Find Contact Screen (Figure 9-4) opens.

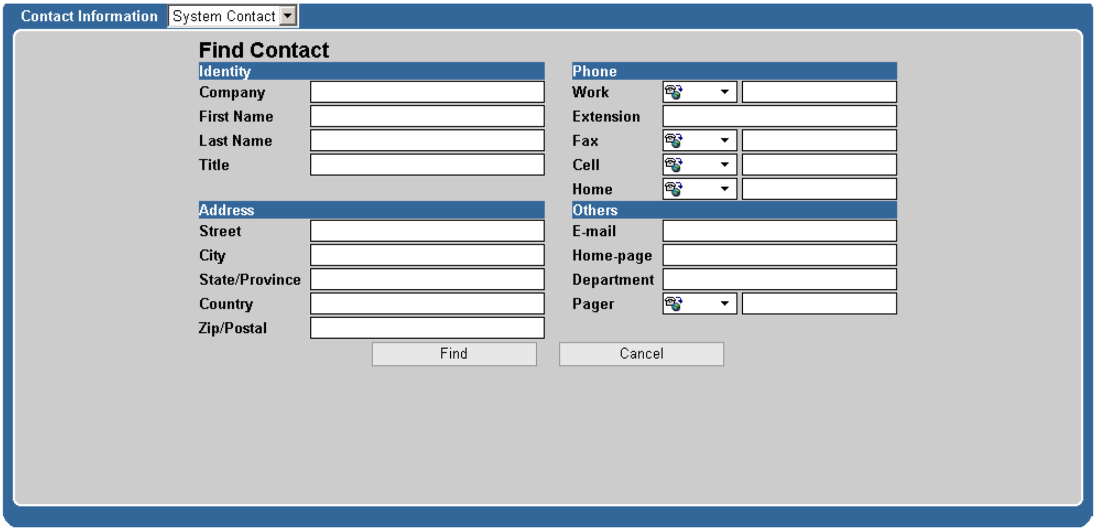

Figure 9-4 Example Find Contact Screen

Because the Find Contact screen can be customized by an Administrator, your screen may look different from the example shown in Figure 9-4.

4. In the **Find Contact** screen, click the **Find** button without entering data into any of the fields.

   All of the contacts in the list you selected appears in the Contact Main Screen (Figure 9-5).

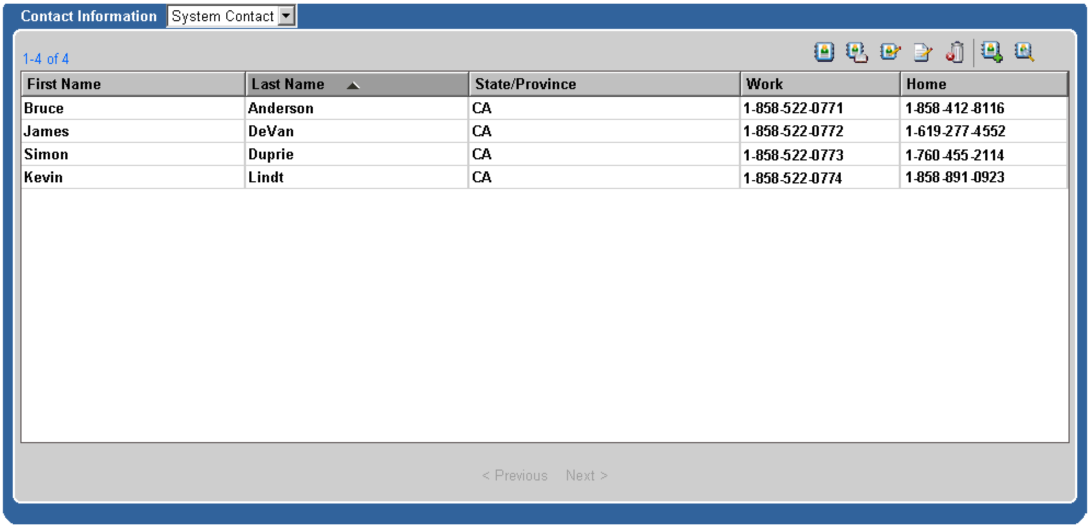

Figure 9-5 Example of Multiple Contact Found

To Search for Specific Contacts

1. After you login to Interaction Manager, click the **Contact** tab to open the Contact Screen (Figure 9-1 on page 9-2).
2. From the **Contact Information** list box, select the contact list to search.
3. Click the **Find** Contact icon. 

   The **Find Contact** screen (Figure 9-4 on page 9-8) appears.

Because the Find Contact screen can be customized by an Administrator, your screen may look different from the example shown in Figure 9-4 on page 9-8.

To Perform a Simple Search

1. In the Find Contact screen, enter a value into any field.

2. Click the **Find** button.

   For example, to find all contacts whose last name is *Smith*, enter *Smith* in the last name field and click **Find**.

   Searches are not case sensitive, so *Smith = SMITH = smith*.

If only one contact record matches your search, Interaction Manager shows you the FULL record for that specific contact. (For an example, see Figure 9-6 on page 9-11.)

If more than one contact matches your search, Interaction Manager shows you the list of contacts matching your search in the Contact Main screen. (For an example, see Figure 9-7 on page 9-12.)

To Perform a Wildcard Search

Interaction Manager supports the asterisk (*****) as a wildcard character:

- The asterisk tells CallCenterAnywhere to *match any number of any characters*.
- You can use wildcard searching in any field in the Find Contact screen.
- Type the asterisk (*****) anywhere in the word or number for which you searching (meaning in the beginning, middle, or end).

Examples:

1. If some Agents have entered the contact's State/Province as *Ca*, *CA*, *Calif.*, and *California*, you could find all contacts in California by entering:

   ca*

   in the **State/Province** field.

2. To find all contacts whose work number is in the *212* area code, enter:

   212*

   in the **Work** field.

3. To find any contact whose title contains the word *Sales*, enter

sales

in the **Title** field.

To View a Contact

1. Use the techniques beginning with “Finding Contact Records” on page 9-7 to find one or more contacts.

   - If your search only matched one contact, Interaction Manager automatically shows you the FULL record for the contact. Figure 9-6 shows an example.

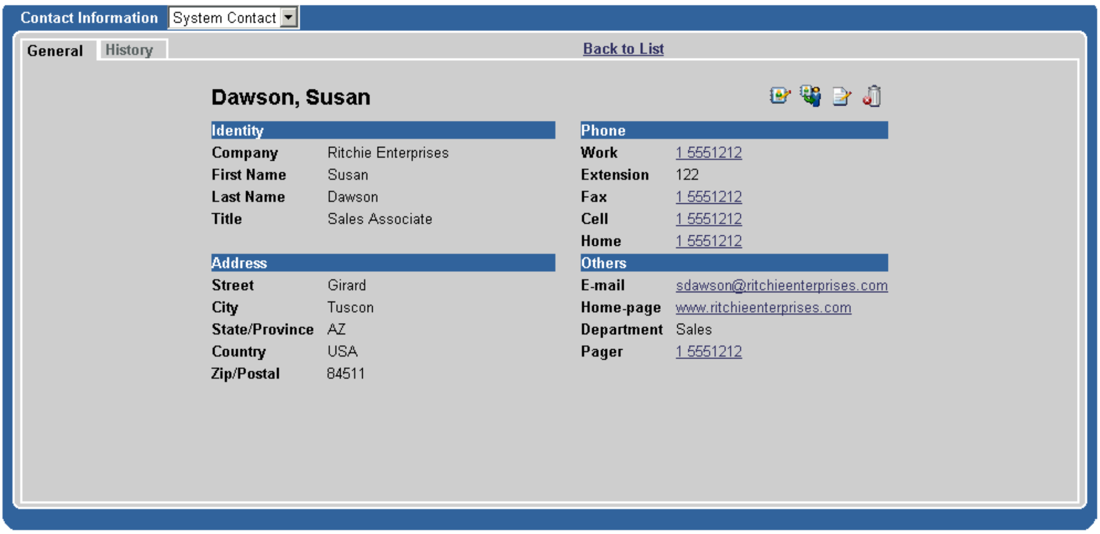

Figure 9-6 Example Viewing a Contact When One Contact is Found

Because the contact screens can be customized by an Administrator, your screen may look different from the example shown in Figure 9-6.

- If your search matched more than one contact, Interaction Manager shows you a list of all contacts matching your search (Figure 9-7).

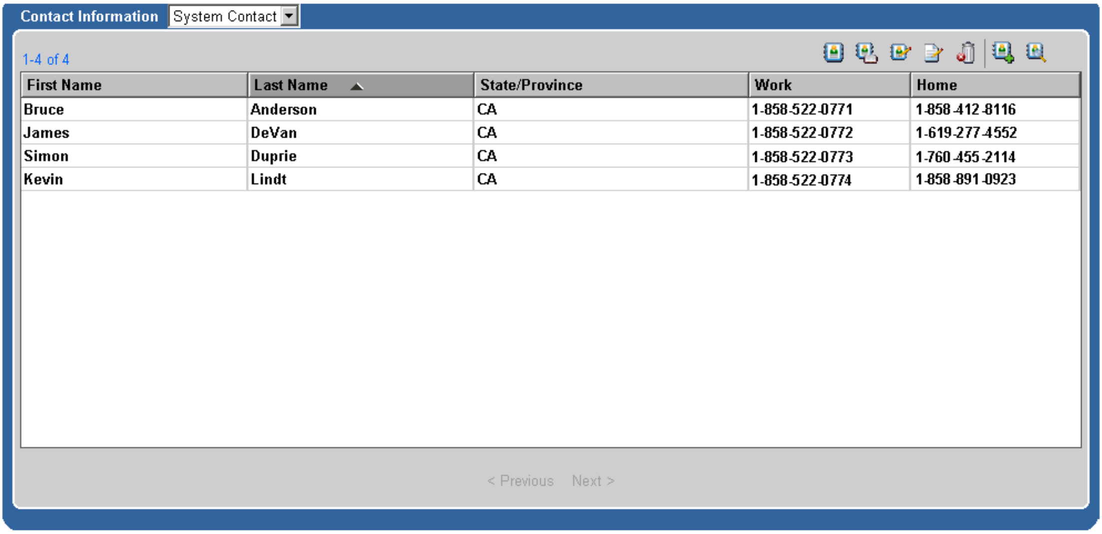

Figure 9-7 Example Viewing a Contact When Multiple Contacts are Found

2. To view one of the Contacts:

   a. Select the contact and click the **View Contact** icon . or

   b. Right-click on the contact and choose **View Contact** from the pop-up menu, or

   c. Double-click on the Contact.

Assigning Contacts - An Overview

A Contact is a record that can have:

- Basic information about the customer (such as their name, address, phone number, and email address).
- A history of all of the times the customer has reached the call center (including how they were routed through the system, who they spoke to or emailed, and so on).

Assigning a contact means that, when the customer reaches the call center, the customer's email address or phone number is "linked" to the same phone number or email address in the list of contacts.

When Interaction Manager is able to link the email or phone number of the current customer (the current interaction) to an email or phone number in a Contact record, we say a contact has been *assigned* to the current interaction.

Assigning a contact record to the current interaction makes some important things happen:

1. You'll see the customer's name appear in the banner area:

Figure 9-8 Banner Display After Assigning a Contact

   If a Contact is not assigned to the current interaction, the **First Name**, **Last Name**, and **Company** fields are blank.

2. Click the **History** tab (Figure 9-9) to view all of the customer's previous history with the call center (including Notes).

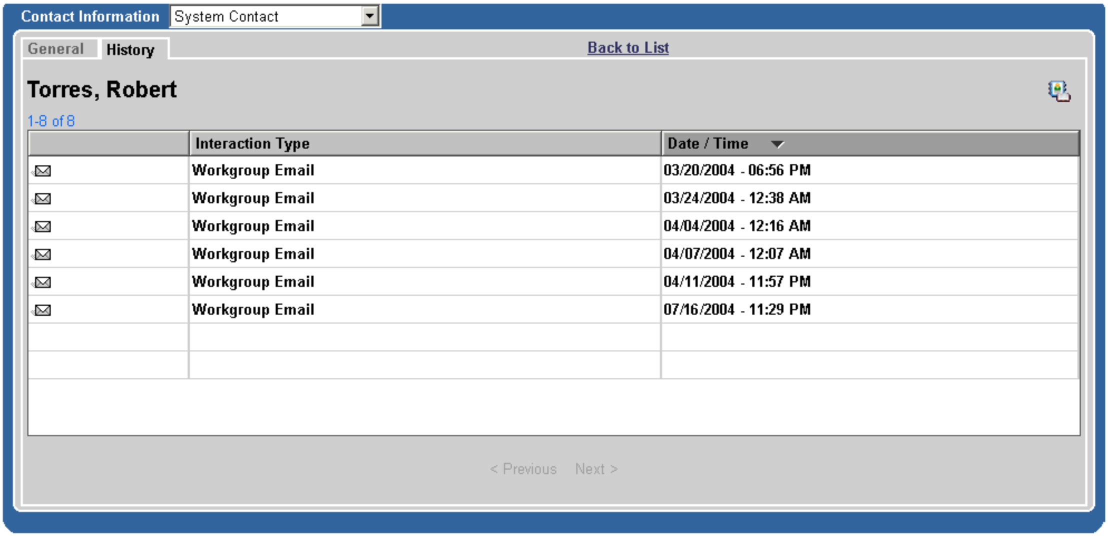

Figure 9-9 Contact History Shows All Previous Interaction Records

3. The most important event that happens after assigning a Contact record to the current Interaction is that, when the Interaction ends, CallCenterAnywhere automatically appends a new Interaction record is to the customer's Contact History.

   If the current Interaction is never assigned to a contact record, you will never build up a history for that customer. You will never be able to know what happened with that customer on previous calls, emails, and so forth.

How Are Contacts Assigned?

Contact records can be assigned (linked) to the current interaction in two ways:

1. **Auto-assignment**. If you already have a contact record for a customer and the customer reaches the call center, Interaction Manager attempts to take the customer's phone number or email address from the interaction and match it to a phone number or email address in the contact list. If a match is made, CallCenterAnywhere automatically assigns the contact record to the current interaction.

2. **Manual assignment**. If a customer reaches the call center and there is no contact record for them, you can create a contact record while you work with the customer, and manually assign the new contact record to the current interaction.

To Manually Assign a Contact to the Current Interaction

1. Accept the Interaction.

2. Create a new contact record. See the instructions beginning with “Creating a New Contact Record” on page 9-3 to learn how to create contacts.

The phone number and email of the contact that you create **MUST MATCH** the phone number and email for the current interaction!

For example, if the email for the customer in the current interaction is *sda@entprise.com* and their phone number is *5551212*, enter *sda@entprise.com* in the Email field of the contact and *5551212* in one of the phone fields (such as Work, Cell, or Home).

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3. View the contact that you just created. Figure 9-10 shows an example. (See “To View a Contact” on page 9-11.)

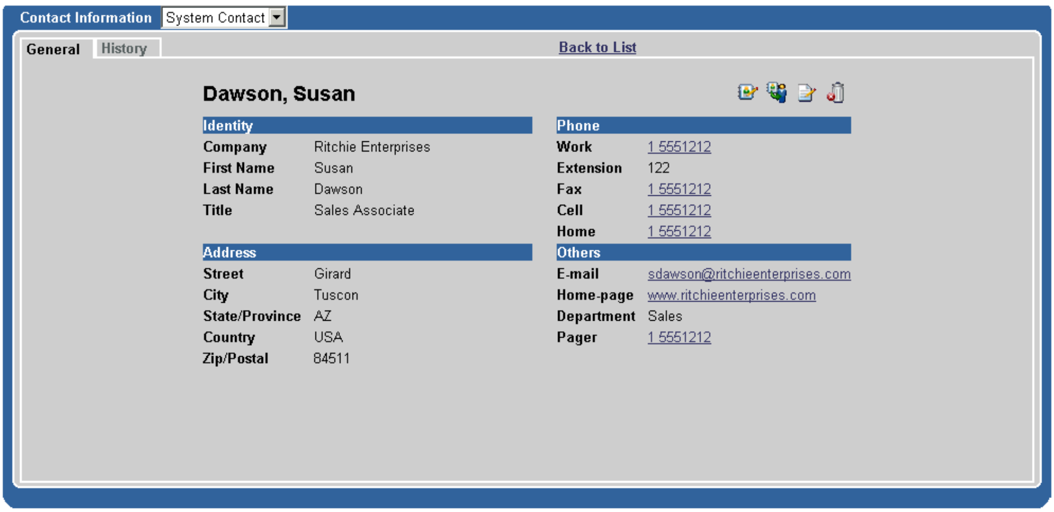

Figure 9-10 Example Contact General Information Screen

4. In the General contact screen, click the Assign Contact icon  .

   If CallCenterAnywhere successfully assigns the Contact to the current interaction, the customer's first name, last name, and company appear in the Banner area (Figure 9-11) at the top of the Interaction Manager screen.

Figure 9-11 Banner Display After Assigning a Contact

Viewing Contact History

Every time a customer reaches a call center, some information about the customer's progress through the call center is recorded, such as:

- The project and workgroup to which the customer was routed.
- The Agent who was offered and accepted the interaction.
- Whether the customer was transferred and to whom.
- Other information.

To View Contact History for Current Interaction

If you are currently handling an Interaction, view the details of what has happened to the customer since they reached the call center by:

1. Click the **Call Control** tab.
2. Click the **Interaction History** button from the Interaction Controls area. Figure 9-12 shows an example of the interaction history for a current interaction.

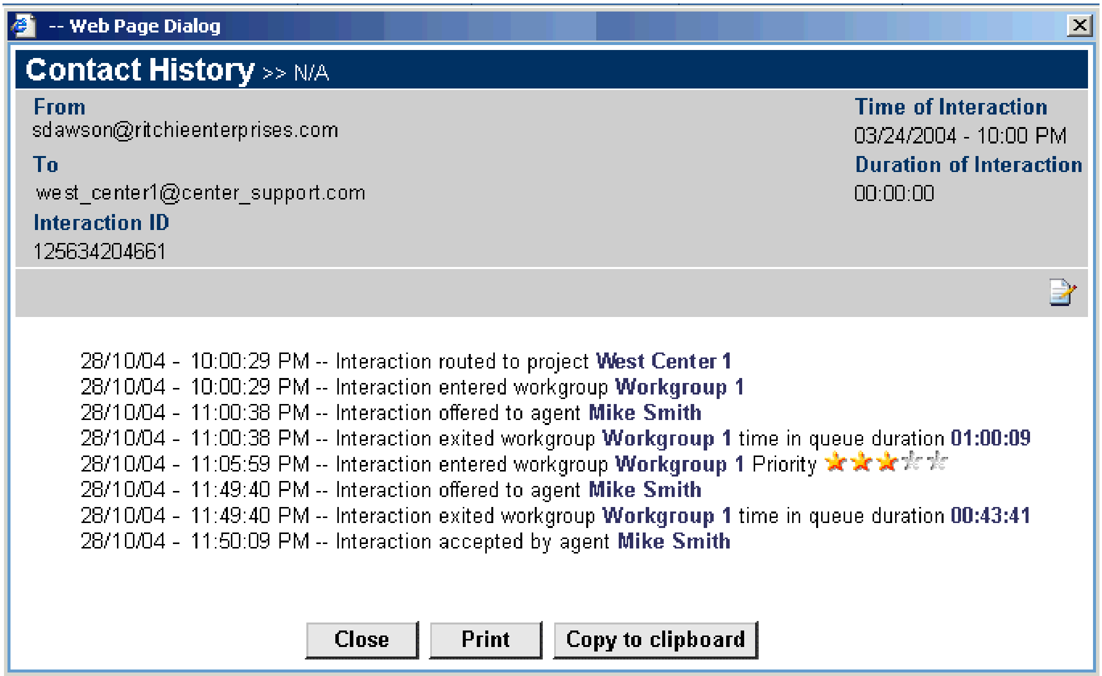

Figure 9-12 Example Interaction History For Current Interaction

Here's the important part:

- If the current Interaction was assigned to a contact (see "Assigning Contacts - An Overview" on page 9-13), when the Interaction ends, CallCenterAnywhere permanently saves the Interaction History and appends it to the contact.

- If the current Interaction was **not** assigned to a contact, the information in the Interaction History is lost when the Interaction ends. If this happens frequently, you will never build up a history for your customers, and you could lose valuable information about their past experiences with your call center.

The Interaction History is appended to the Contact as an **Interaction Record**. This means, at any time, you can view all of a contact's Interaction Records (their complete history with your call center).

Example:

A new customer reaches your call center (by email, phone, or other means) and you accept the Interaction. The customer has never contacted your call center before, so you create a new Contact record for them (see “Creating a New Contact Record” on page 9-3) and manually assign the Contact to the current Interaction (see “To Manually Assign a Contact to the Current Interaction” on page 9-15).

While you are working with the customer, Interaction Manager continues to record how long the interaction is taking and other information. When you end the Interaction, the system saves the Interaction History and appends it to the Contact. The Contact now has one Interaction Record.

A few days later, the same customer reaches the call center. This time, since Interaction Manager already has a Contact record for the customer (with their email address and phone number), the system auto-assigns the Contact record to the customer. Now, when you end the Interaction, the system saves the Interaction History as a new Interaction Record and attaches it to the Contact. The Contact now has two separate interaction records associated with them.

To View a Contact’s History (Interaction Records)

1. Find the contact.

   a. Click the **Contact** tab.

   b. From the **Contact Information** list box, select the contact list to search.

   c. To learn how to search for contacts, see “Finding Contact Records” on page 9-7,

   or

   d. To quickly see all contacts in the current Contact list:

      i. Click the **Find** Contact icon.

      ii. In the **Find Contact** screen, click the **Find** button without entering data into any of the fields.

2. View the Contact History two ways:

   a. If you are looking at a list of Contacts, right-click on the Contact and choose **Contact History** from the pop-up menu. Figure 9-13 shows an example.

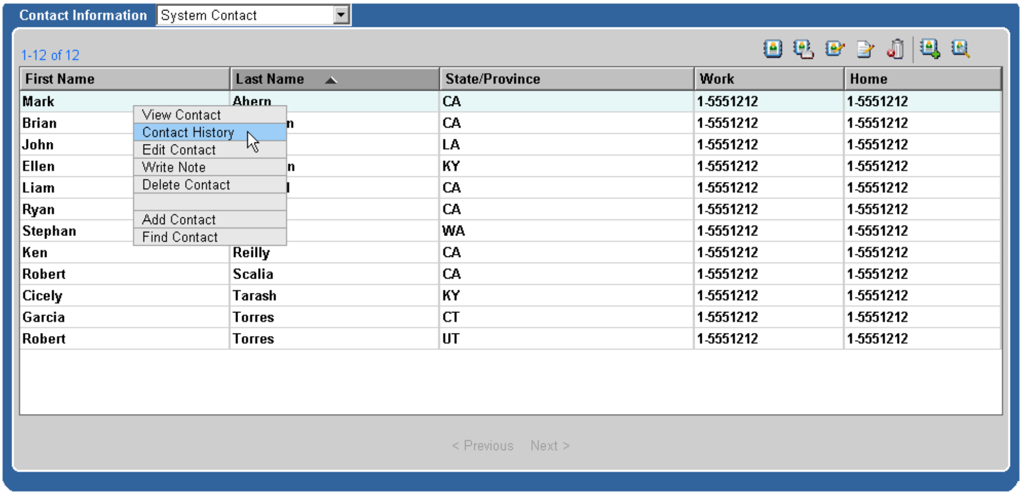

Figure 9-13 Select Contact History From the Pop-up Menu

   b. If you are looking at a single Contact record, click the **History** tab (Figure 9-14).

Figure 9-14 Example Single Contact Record - History Tab

The History tab (Figure 9-15) displays all of the Contact's Interaction Records.

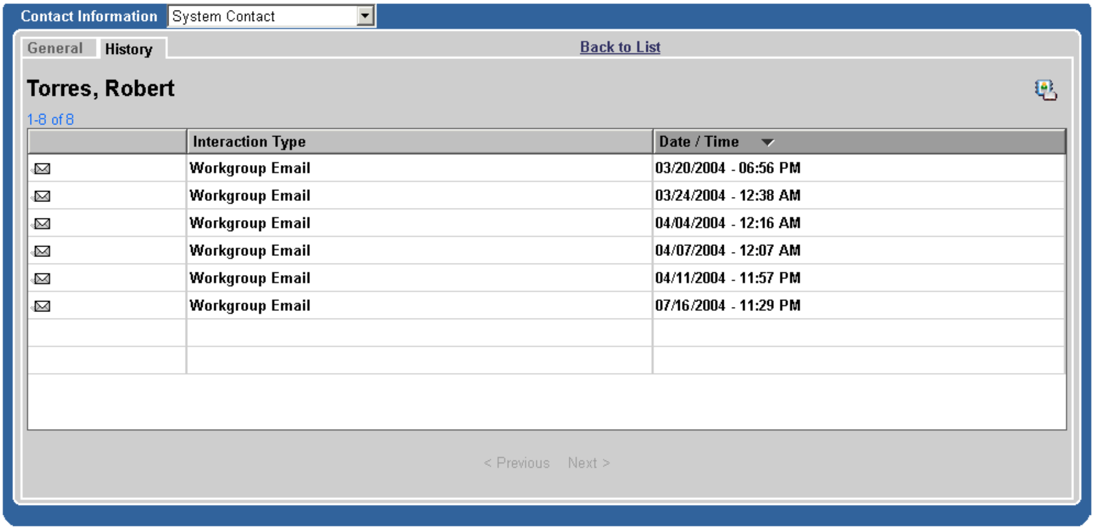

Figure 9-15 Example All Contact Records - History Tab

3. Double-click on any Interaction Record to view it.

   or

4. You can also select the Interaction Record and click the **Open** icon  . Figure 9-16 shows an example.

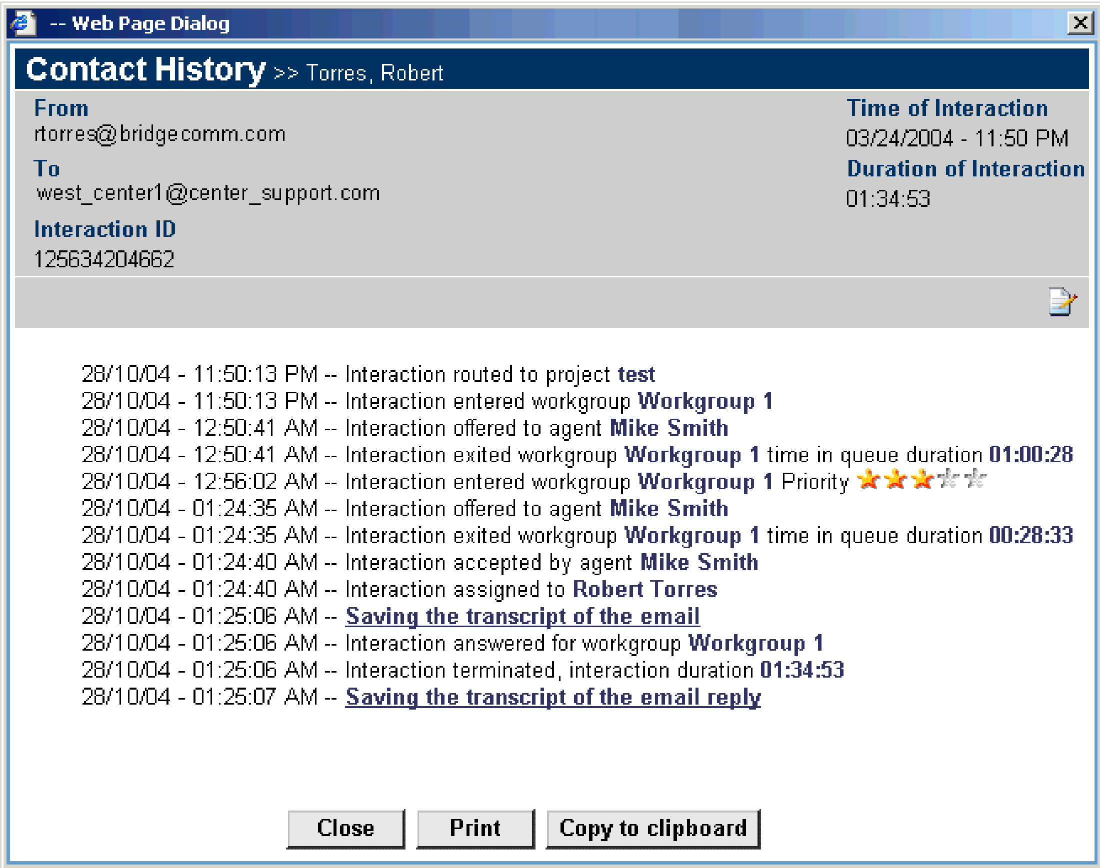

Figure 9-16 Example Interaction Record

To Print an Interaction History Record

1. Find the contact.

   a. Click the **Contact** tab.

   b. From the **Contact Information** list box, select the contact list that you want to search.

   c. To learn how to search for contacts, see page 9-7

   or

d. To quickly see all contacts in the current Contact list:

    i. Click the **Find** Contact icon.

    ii. In the **Find Contact** screen, click the **Find** button without entering data into any of the fields.

2. View the Contact History two ways:

    a. If you are looking at a list of Contacts, right-click on the Contact and choose **Contact History** from the pop-up menu. (See Figure 9-14 on page 9-19.)

    b. If you are looking at a single Contact record, click the **History** tab. (See Figure 9-15 on page 9-20.)

3. Double-click on the Interaction record.

4. Click the **Copy to Clipboard** button.

5. You can now paste the contents of the clipboard into any text or word processing document.

To Listen to a Recorded Interaction

You can use Interaction Manager to record your phone Interactions and listen to the recording later. (See “To Record a Caller” on page 4-20.)

1. Find the contact.

    a. Click the **Contact** tab.

    b. From the **Contact Information** list box, select the contact list to search.

    c. To learn how to search for contacts, see “Finding Contact Records” on page 9-7

    or

    d. To quickly see all contacts in the current Contact list:

        i. Click the **Find** Contact icon.

        ii. In the **Find Contact** screen, click the **Find** button without entering data into any of the fields.

2. View the Contact History two ways:

   a. If you are looking at a list of Contacts, right-click on the Contact and choose **Contact History** from the pop-up menu. (See Figure 9-14 on page 9-19.)

   b. If you are looking at a single Contact record, click the **History** tab. (See Figure 9-15 on page 9-20.)

3. Double-click on the Interaction that contains the recording.

   The Contact History dialog box (Figure 9-17) opens.

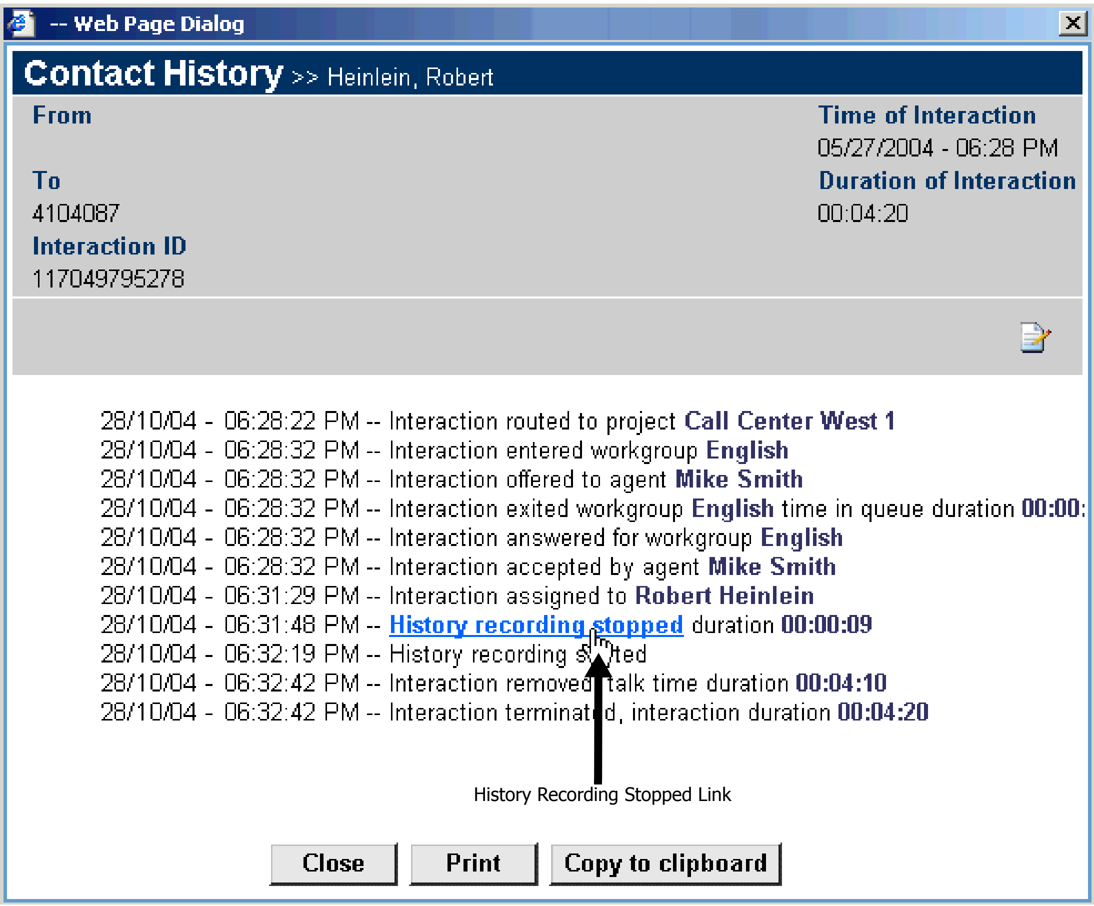

Figure 9-17 Contact History - Showing a Recording

4. Click the **History Recording Stopped** hyperlink.

   The recorded Interaction opens in your music player software and begins to play.

Adding Notes

Although Interaction Manager automatically records Interaction History (time in queue, transfers, Agent's name, and so forth) there are times when you want to add some information about the customer (such as problems they have had, their previous questions, or technical notes).

Interaction Manager has two types of Notes:

- **You can add a Note to an Interaction**. For example, you can record information that was specific to one Interaction (such as a complaint that a customer had on a particular day).

  Interaction Notes appear as hyperlinks inside an Interaction Record.

See "To View a Contact's History (Interaction Records)" on page 9-18 to learn more about Interaction Records.

- **You can add a Note to a Contact**. For example, you can attach a more general note to a Contact (such as noting the type of equipment the customer uses).

  Contact notes appear in the Contact's History tab.

Adding a Note to an Interaction

- **You can add a Note to the current Interaction History.**

  The current Interaction History is information recorded while you are working with a customer.

- **You can add a Note to an existing Interaction Record**.

  If the Interaction was assigned to a Contact, the system saves the Interaction History as an Interaction Record and appends it to that Contact. (See "Assigning Contacts - An Overview" on page 9-13.)

To Add a Note to the Current Interaction

If you are currently handling an Interaction:

1. Select the **Call Control** tab.

2. Click the **Interaction History** button from the Interaction Controls area.

   The Interaction History for the current Interaction appears (Figure 9-18).

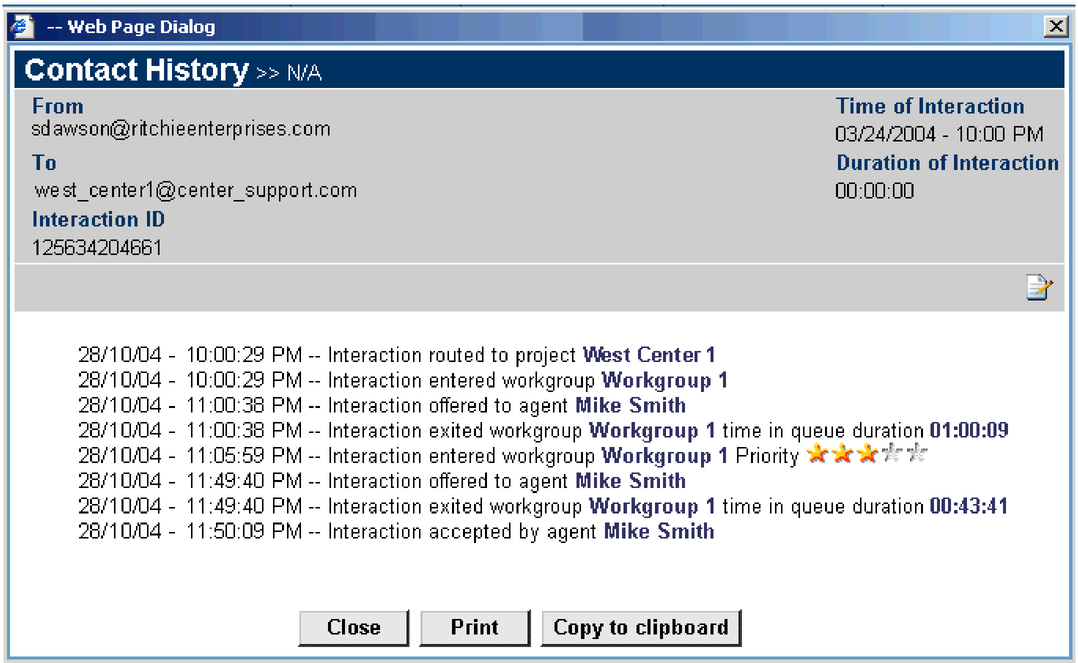

Figure 9-18 Example Interaction History for Current Interaction

3. Click the **Write Note** icon .

   The Note dialog box appears (Figure 9-19).

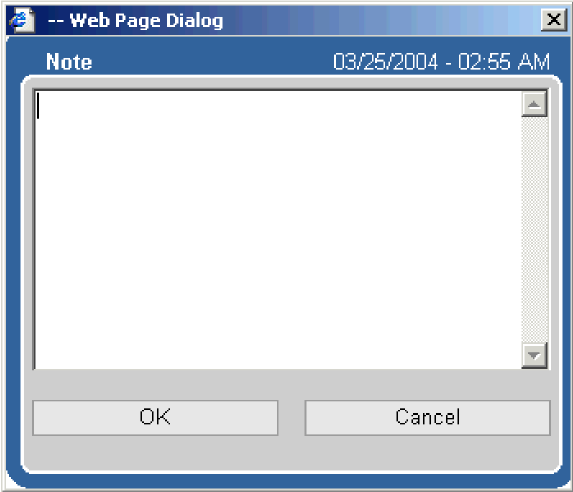

Figure 9-19 Note Dialog Box

4. Enter your Note text and click the **OK** button.

To View a Note Attached to the Current Interaction History

1. From Call Control, click the **Interaction History** button located in the Interaction Controls area.

If the Interaction History window was open when you created the Note, you must close and re-open the Interaction History window.

A hyperlink to your Note (Figure 9-20) appears as an entry in the Interaction History.

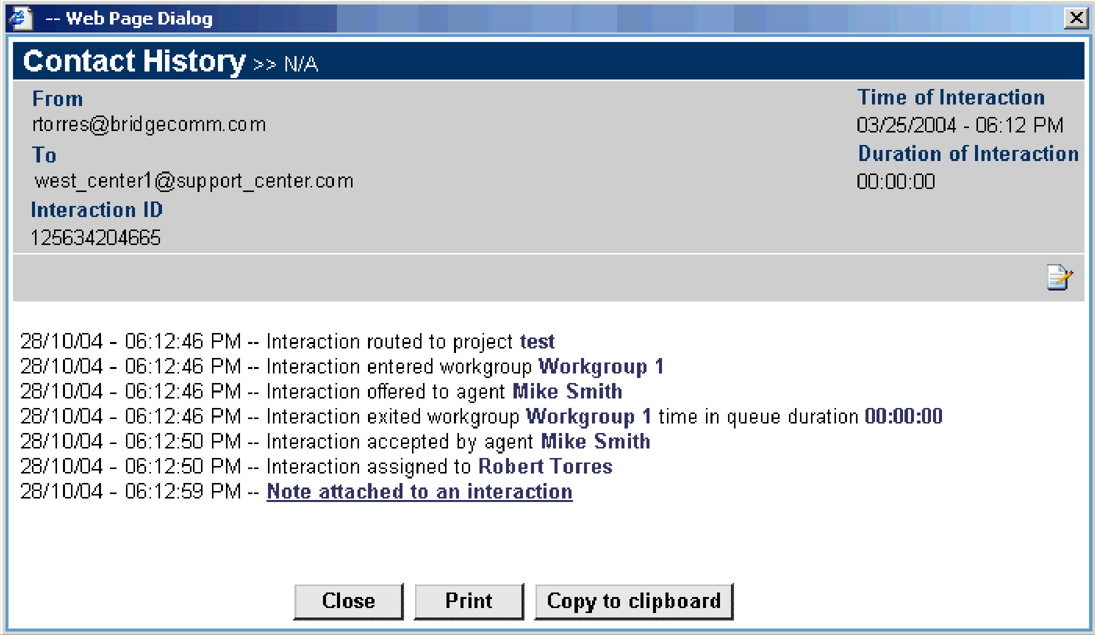

Figure 9-20 Note Link in Interaction History

2. Click the Note hyperlink.

   A window appears showing the contents of the Note.

You cannot edit an existing Note.
To change the information, you must create a new Note.

To Add a Note to an Existing Interaction Record

1. Find the contact.

   a. Click the **Contact** tab.

   b. From the **Contact Information** list box, select the contact list to search.

c. To learn how to search for contacts, see “Finding Contact Records” on page 9-7.

   or

d. To quickly see all contacts in the current Contact list:

   i. Click the **Find** Contact icon.

   ii. In the **Find Contact** screen, click the **Find** button without entering data into any of the fields.

2. View the Contact History.

   See “To View a Contact’s History (Interaction Records)” on page 9-18.

3. Double-click on an Interaction Record to open it.

4. Click the Write Note icon .

   The Note dialog box appears (Figure 9-19 on page 9-26).

5. Enter your Note text and click the **OK** button.

To View a Note Attached to an Existing Interaction

1. Find the contact.

   a. Click the **Contact** tab.

   b. From the **Contact Information** list box, select the contact list to search.

   c. To learn how to search for contacts, see “Finding Contact Records” on page 9-7

      or

   d. To quickly see all contacts in the current Contact list:

      i. Click the **Find** Contact icon.

      ii. In the **Find Contact** screen, click the **Find** button without entering data into any of the fields.

2. View the Contact History.

   See “To View a Contact’s History (Interaction Records)” on page 9-18.

3. Double-click on an Interaction Record to open it.

   A hyperlink to your Note (Figure 9-20 on page 9-27) appears as an entry in the Interaction Record.

4. Click the Note hyperlink.

   A window appears showing the contents of your Note.

You cannot edit an existing Note.
To change the information, you must create a new Note.

To Add a Note to a Contact

1. Find the contact.

   a. Click the **Contact** tab.

   b. From the **Contact Information** list box, select the contact list to search.

   c. To learn how to search for contacts, see “Finding Contact Records” on page 9-7,

      or

   d. To quickly see all contacts in the current Contact list:

      i. Click the **Find** Contact icon.

      ii. In the **Find Contact** screen, click the **Find** button without entering data into any of the fields.

2. If you are looking at a list of Contacts:

   a. Right-click on the Contact.

   b. Choose **Contact History** from the pop-up menu (Figure 9-21).

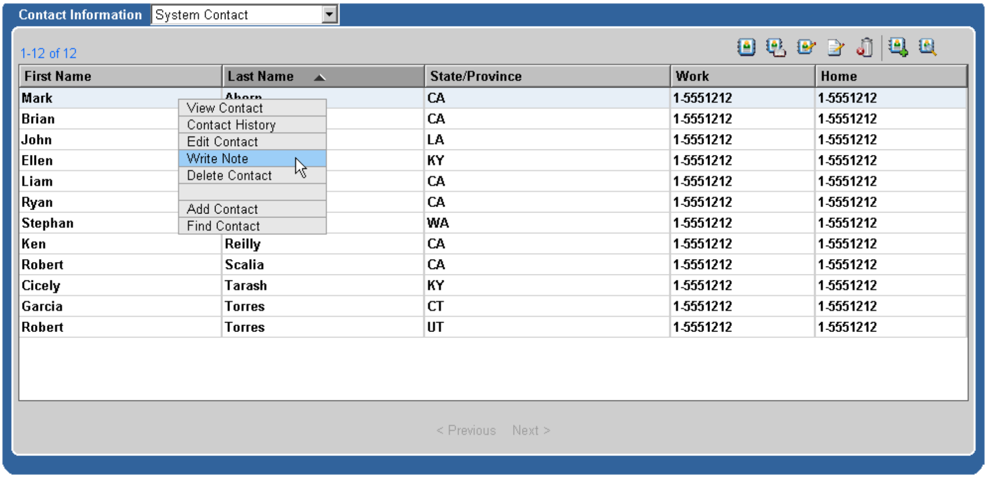

Figure 9-21 Select Contact History

3. If you are looking at a single Contact record:

   a. Click the Write Note icon .

      The Note dialog box (Figure 9-22) appears.

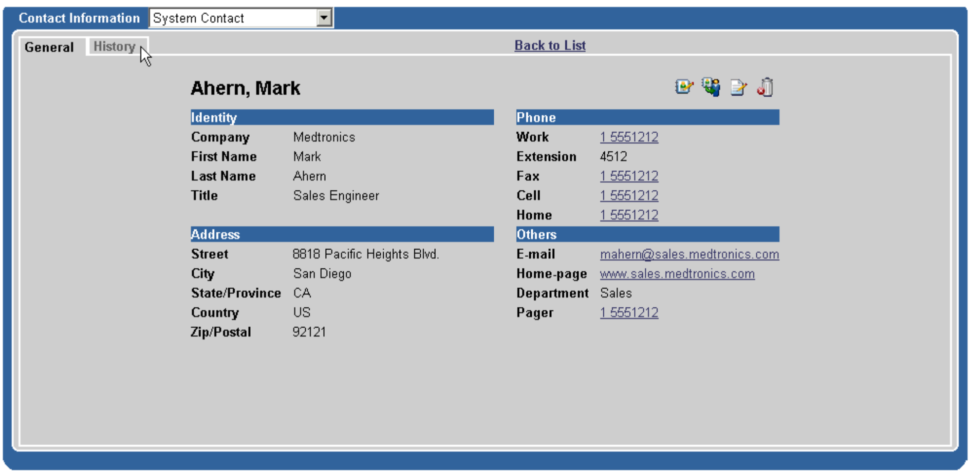

Figure 9-22 Note Dialog Box

4. Enter your Note text and click the **OK** button.

To View a Note Attached to a Contact

1. Find the contact.

   a. Click the **Contact** tab.

   b. From the **Contact Information** list box, select the contact list to search.

   c. To learn how to search for contacts, see “Finding Contact Records” on page 9-7,

      or

   d. To quickly see all contacts in the current Contact list:

      i. Click the **Find** Contact icon.

      ii. In the **Find Contact** screen, click the **Find** button without entering data into any of the fields.

2. View the Contact History.

   See “To View a Contact’s History (Interaction Records)” on page 9-18.

   Any Notes that were attached to the Contact appear in the History tab ().

3. Double-click on the Note to view.

   A window appears showing the contents of the Note.

You cannot edit an existing Note.
To change the information, you must create a new Note.

Communicating with a Contact

Use the Interaction Manager Contact Screen to quickly place a call, email, or fax to any customer who has a Contact record.

1. Find the contact.

   a. Click the **Contact** tab.

   b. From the **Contact Information** list box, select the contact list to search.

   c. To learn how to search for contacts, see “Finding Contact Records” on page 9-7,

   or

   d. To quickly see all contacts in the current Contact list:

      i. Click the **Find** Contact icon.

      ii. In the **Find Contact** screen, click the **Find** button without entering data into any of the fields.

2. View the Contact record (Figure 9-23).

Figure 9-23 Example Contact Record

Because your Administrator can customize the Contact record screen, your screen may look different from the example shown in Figure 9-23.

3. Click one of the hyperlinks in the Contact Record Screen. Table 9-2 shows the different hyperlinks and describes what they do when clicked.

If your Administrator customized your Contact Record Screen, you may not see all of the fields described in Table 9-2.

Table 9-2. Contact Record Hyperlinks

Hyperlink	Action
Work	Dials the Contact’s **Work Phone** number
Fax	Allows you to select a fax, a project for billing the Interaction, and dials the Contact’s **Fax** number. See below for more information.
Cell	Dials the Contact’s **Cellular** number.
Home	Dials the Contact’s **Home Phone** number.
Email	If you have told Interaction Manager about the mail program that you use (Configure > General > Current Email Client), Interaction Manager opens a new email message and places the customer’s email address in the “To:” field. The return address on the email is the address you configured as your return address in your Email client program (not your CallCenterAnywhere email address).
Home Page	Launches a Web browser and opens the Web page identified in the hyperlink.

To Send an Email to a Customer

1. In a Contact Record Screen (Figure 9-23 on page 9-32), click the E-mail hyperlink.

   An Email program automatically opens to a new message, with the customer's email address in the "To:" field. The return address on the email is your address, as configured in your Email client program (not your CallCenterAnywhere email address).

The Email application launched by the **Send Email** button may not be the same Email application configured in your Interaction Manager for handling Email Interactions (refer to "Notification Mode (for New Interactions)" on page 2-5).

---

2. It is important to note that when you send an email message to a customer using the **Send Email** button on the Contact screen:

   a. CallCenterAnywhere does not track these messages.

   b. You cannot view these messages later in the History screen.

To keep a record of Email messages you send to customers, use the Call Control screen to accept and respond to Email Interactions (refer to "Responding to Email" on page 6-3).

To Send a Fax to a Customer

1. In a Contact Record Screen (Figure 9-23 on page 9-32), click the customer's Fax number hyperlink.

   The Select a Fax dialog box (Figure 9-24) appears.

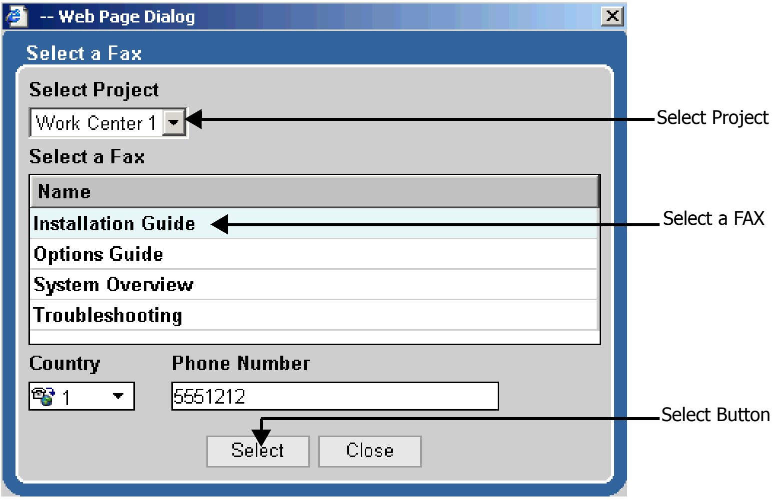

Figure 9-24 Select a Fax Dialog Box

2. From the Select Project drop-down list, select the project to which Interaction will be billed.

3. From the Select a Fax list, double-click the Fax to send to the customer (or click on the Fax and then click the **Select** button).

   Interaction Manager dials the number and sends the Fax.

If you don’t see a list of Projects and Faxes in the dialog box, they may not have been configured. Contact your Administrator.

Managing Tasks

In Interaction Manager, the Task Screen provides a task list area and a calendar, which you can view by day, week, or month. From the Task Screen (Figure 10-1), you can:

- Organize your To Do lists, events, meetings, reminders, and appointments
- Dial, email, or fax Contacts with a simple mouse click

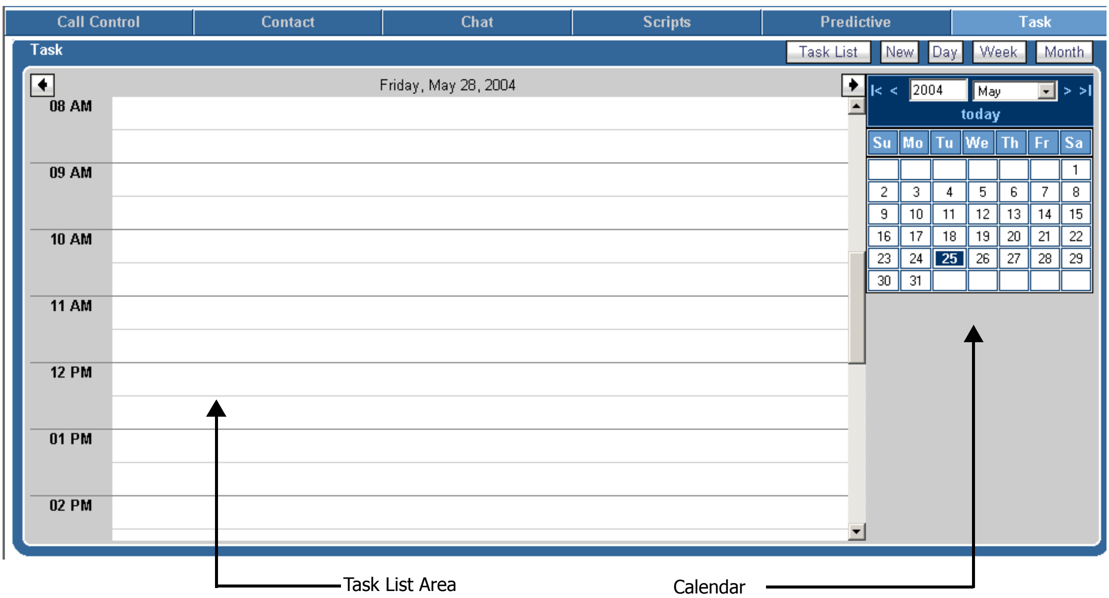

Figure 10-1 Task Screen

To Navigate Within Your Task Screen

1. Select the **Task** tab.

2. Select one of the Task Buttons (Figure 10-2), located above the calendar, to change the Task view to match your selection.

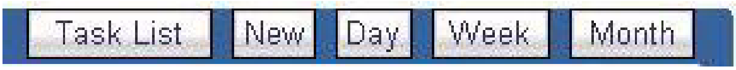

Figure 10-2 Task Buttons

a. Click the **Day** button to change the Task view to a single day, in hourly increments from 12AM to 11PM (Figure 10-3).

Figure 10-3 Task View - Day

i. Click the left arrow button to show the previous day.

ii. Click the right arrow button to show the next day.

b. Click the **Week** button to change the Task view to an entire week (Figure 10-4).

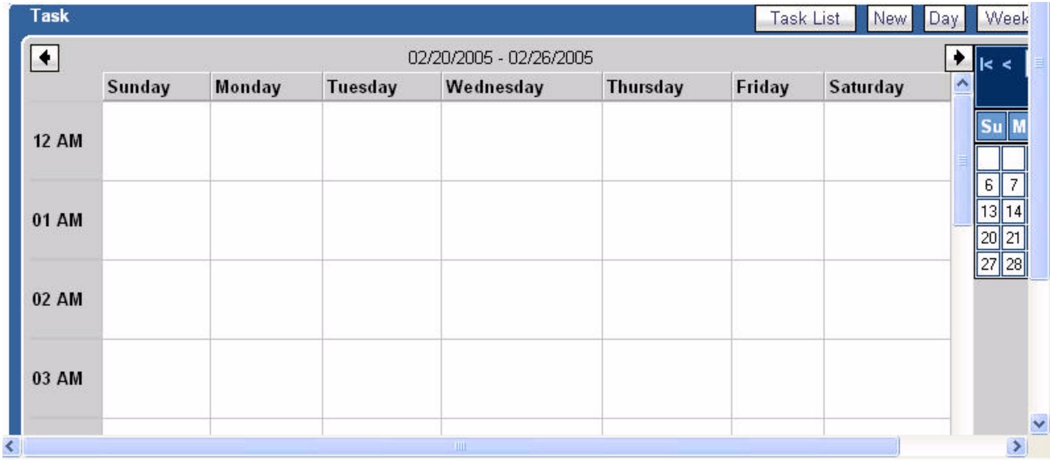

Figure 10-4 Task View - Week

i. Click the left arrow button to show the previous week.

ii. Click the right arrow button to show the next week.

c. Click the **Month** button to change the Task view to an entire month (Figure 10-5).

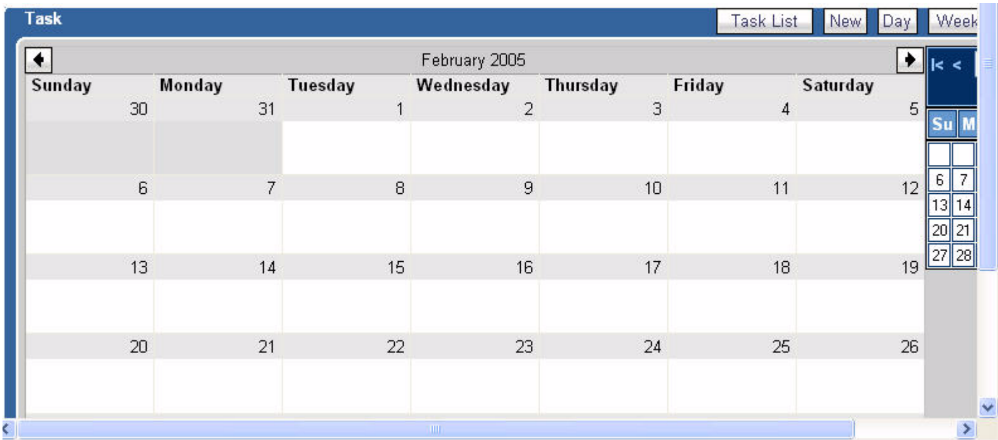

Figure 10-5 Task View - Month

i. Click the left arrow button to show the previous month.

ii. Click the right arrow button to show the next month.

To Navigate Using the Task Calendar

1. Select the **Task** tab.
2. Within the Task Calendar (Figure 10-6), you can:
    a. Change months by making a selection from the drop-down list, or by clicking the inner most left arrow (for the previous month) or the inner most right arrow (for the next month).

    b. Change years by clicking the outer most left arrow (for the previous year) or the outer most right arrow (for the next year).

    c. Change to a different day by clicking on a date button.

    d. Return to the current day by clicking the **Today** icon.

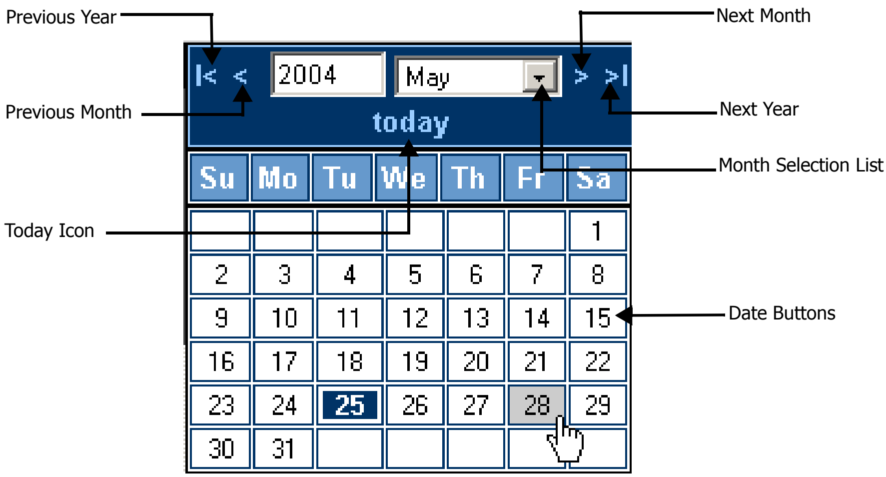

Figure 10-6 Task Calendar

Creating Tasks

To Create a New Task

1. In the Task Screen (Figure 10-1 on page 10-1), click the day on the calendar when you want to create the task.

2. The Task View area changes to show the day you selected, in hourly increments from 12AM to 11PM.

3. Double-click on the time when you want the task to begin.

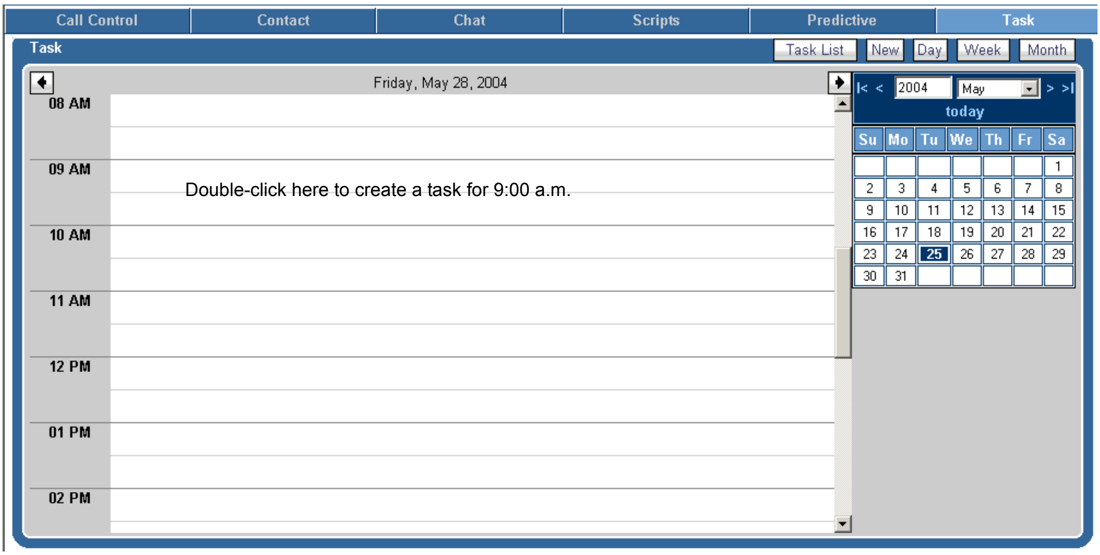

Figure 10-7 Double-Click a Starting Task Time

The Task Dialog Box (Figure 10-8) opens.

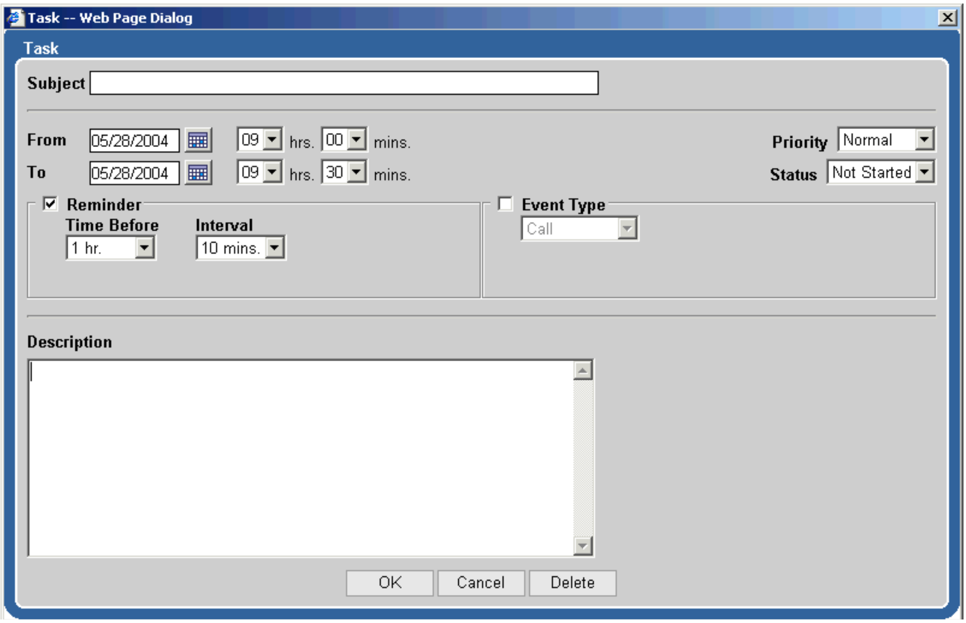

Figure 10-8 Task Dialog Box

a. Type a **Subject** for the task (such as *Staff Meeting*).

   The subject appears on your calender.

b. Click the **From** and **To** areas to change the date of the task.

   A calendar opens for you to make a selection. (See "To Navigate Using the Task Calendar" on page 10-4 for how to select a to and/or from date.)

c. From the hour and minutes drop-down lists, select how long the task will last.

d. Click the **Reminder** check box to have a message box pop up on your computer screen as a reminder of the task.

   i. From the **Time Before** drop-down list, select when you want the system to send you the first reminder (such as 5 mins. before the task begins).

   ii. From the **Interval** drop-down list, select how often you want the system to send you the reminder before the task begins (such as every 5 mins., 10 mins., ... 1 hr.).

e. When you click the **Event Type** check box, additional selections appear (Figure 10-9).

Figure 10-9 Event Type Selections

i. If you select an Event Type of **Call**, you must also select a **Call Type** (External, Internal, PBX, or IP) and a **County** from the drop-down lists, and enter the phone number.

ii. If you select an Event Type of **Email**, you must also type an email address.

iii. If you select an Even Type of **Fax**, you must also select a **Country** (from the drop-down list) and enter the fax number.

f. Select a **Priority** from the drop-down list.

Choosing a Priority adds a color code (Figure 10-10) to the task on your calendar.

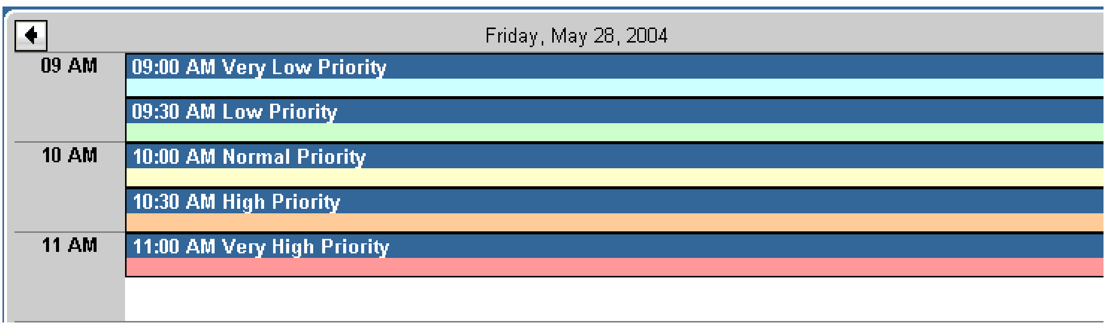

Figure 10-10 Task Priority Color Codes

Table 10-1 shows each Color Code and its corresponding priority level.

Table 10-1. Task Priority Color Codes

Priority Level	Color
Very Low Priority	Blue
Low Priority	Green
Normal Priority	Yellow
High Priority	Orange
Very High Priority	Red

g. From the **Status** drop-down list, select **Not Started**, **Started**, **Completed**, or **Waiting**.

h. In the **Description** box, type a description of the Task.

4. Click **OK**.

The Task appears in the Task View area (see Figure 10-10 on page 10-7) and a reminder (Figure 10-11), if you selected one, appears at the time(s) you indicated.

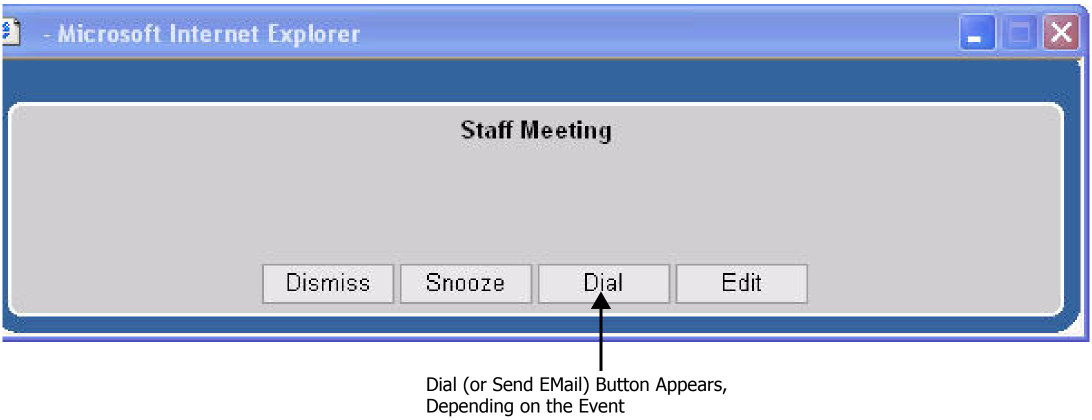

Figure 10-11 Example Reminder Notification

When you click on the **Dial** or **Email** button (in the Reminder), Interaction Manager dials the number for you or opens an email message that is already addressed.

Other Ways to Create a New Task

1. If you are looking at the Week or Month view, double-click on any day and the new Task dialog box appears.

2. No matter how you are viewing your calendar (Day, Week, or Month), click the **New** button at any time to create a new Task.

Viewing, Editing, and Deleting Tasks

To View Your Task List

1. In the Task Screen (Figure 10-12), click the **Task List** button.

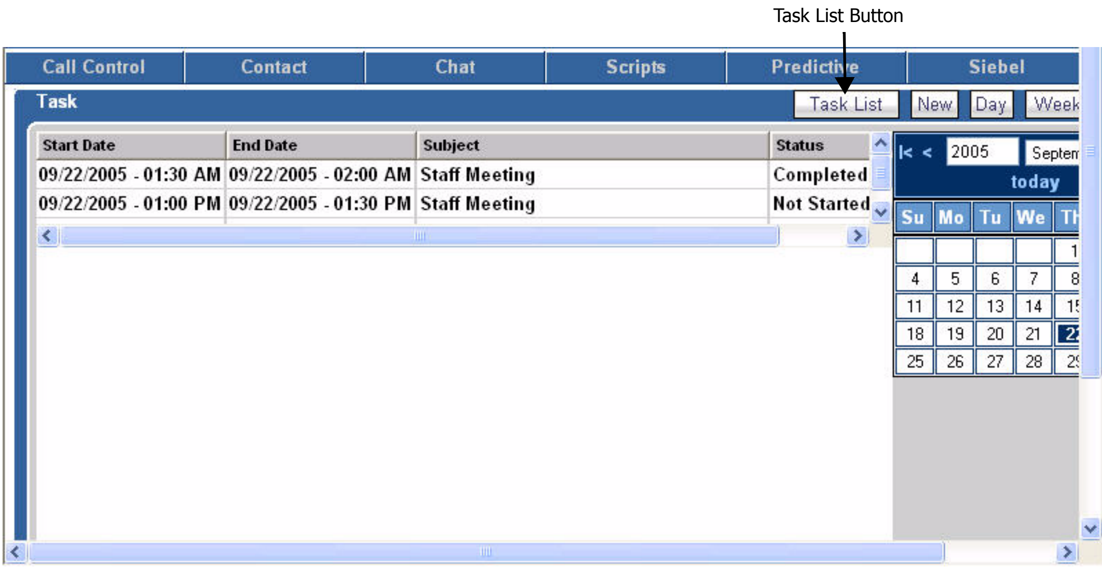

Figure 10-12 Viewing Your Task List

The Task View area changes to show a list of tasks. Each task also shows the start date, end date, subject, status, and priority rating number.

2. Double-click any task to open the Task dialog box (Figure 10-8 on page 10-6) for that task.

To Edit a Task

If you know the day on which the task occurs:

1. Double-click on the Task to open the Task dialog box (Figure 10-8 on page 10-6).

2. You can then change the Task information. (See “To Create a New Task” on page 10-5.)

If you do not know the day on which the task occurs:

1. Click the **Task List** button to see all of the Tasks that you have created.

2. Double-click on any Task to open the Task dialog box (Figure 10-8 on page 10-6).

3. You can then change the Task information. (See “To Create a New Task” on page 10-5.)

To Delete a Task

If you know the day on which the task occurs:

1. Double-click on the Task to open the Task dialog box (Figure 10-8 on page 10-6).

2. In the Task dialog box, click the **Delete** button.

3. Click **OK** to confirm the deletion.

If you do not know the day on which the task occurs:

1. Click the **Task List** button to see all of the Tasks that you have created (Figure 10-12 on page 10-9).

2. Right-click on any Task and choose **Delete** from the pop-up menu.

3. Click **OK** to confirm the deletion.

Additional Activities

This chapter discusses miscellaneous tasks that you can perform with Interaction Manager, including:

- Viewing Real-Time Statistics
- Wrapping Up
- Controlling Your Status
- Managing Missed Calls and Voicemail Messages
- Creating a Scheduled Conference

Viewing Real-Time Statistics

Use the **My Statistics** button (Figure 11-1) in the Call Control tab (Personal Options area) to see real-time statistics on:

- How many Interactions you have handled since 12:00 AM (midnight) today.
- How quickly (on average) you accepted Interactions that were offered to you since 12:00 AM (midnight) today.
- How long you have been logged in and how much you have spent being “Busy,” “Available,” or “On Break,” since 12:00 AM (midnight) today.

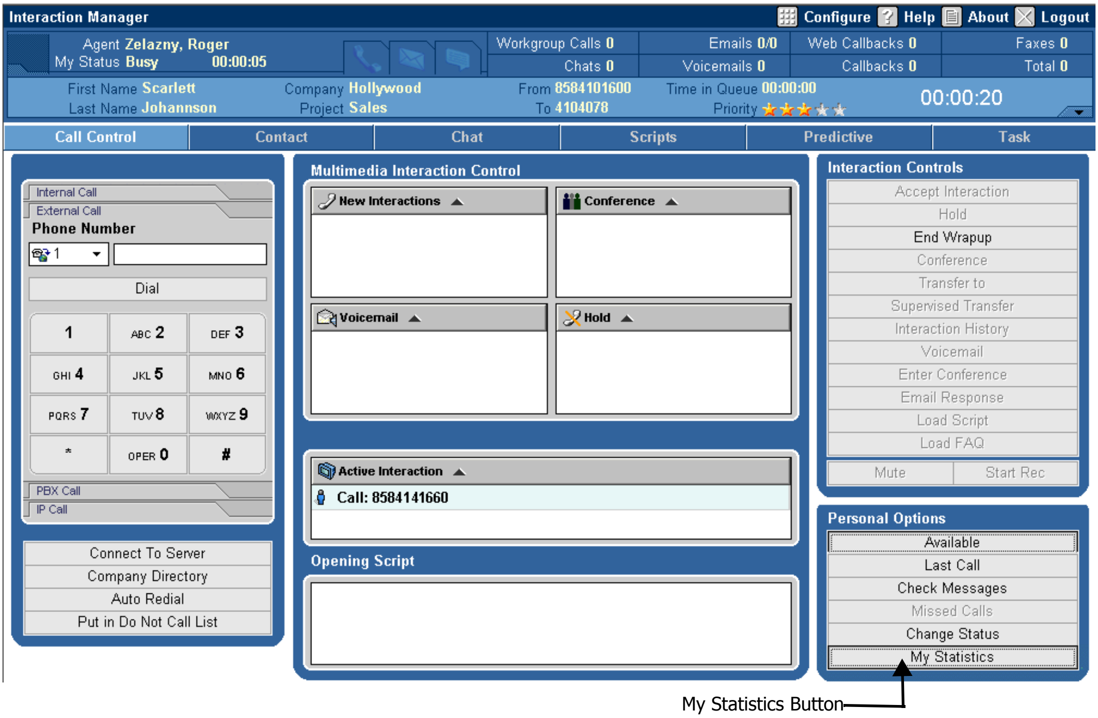

Figure 11-1 My Statistics Button

To View "My Statistics"

1. Click on the **My Statistics** button in the Call Control tab (in the Personal Options area).

   The My Statistics dialog box opens. Figure 11-2 shows an example display.

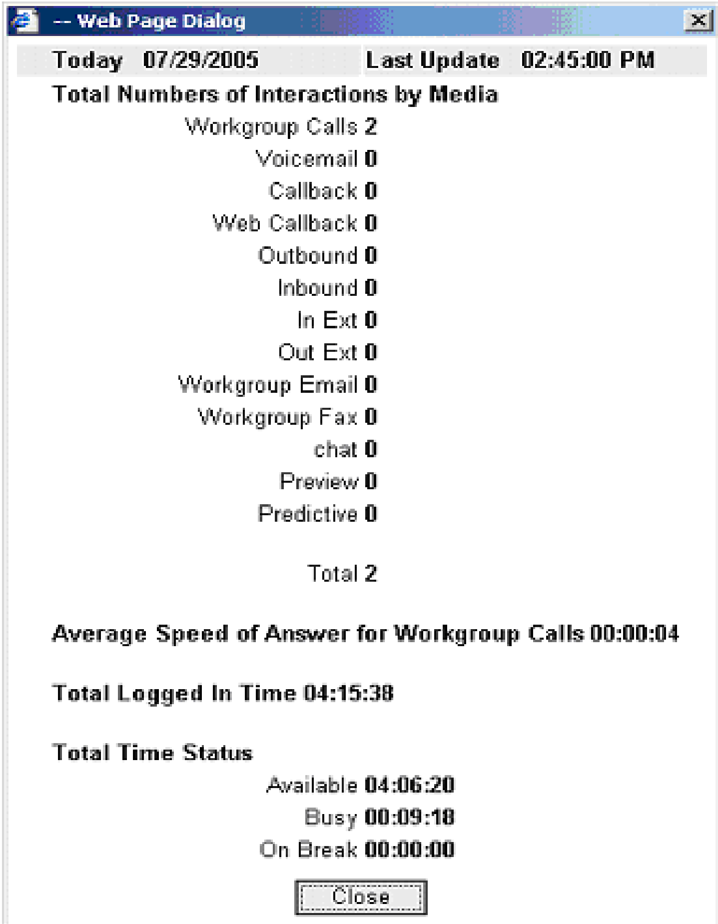

Figure 11-2 Example My Statistics Display

2. Refer to Table 11-1 for a description of each field in the My Statistics display.

Table 11-1. My Statistics Fields and Meanings

Field	Description
Total Number of Interactions by Media	These statistics tell you how many Interactions of different types you have accepted since 12:00 AM today. For example, if “Web Callback” shows “4”, it means that you have accepted four Web Callback Interactions since 12:00 AM today.

Table 11-1. My Statistics Fields and Meanings

Field	Description
Average Speed of Answer for Interactions	When the system offers you an Interaction (the Interaction appears in the New Interaction area) a timer starts. When you accept the Interaction, the timer stops. This statistic shows how quickly, on average, you accepted Interactions since 12:00 AM today.
Total Logged In Time	The total amount of time that you were logged into Interaction Manager since 12:00 AM today. This timer starts when you login and stops when you logout. It is reset every day at Midnight.
Total Time Status	The total amount of time that you spent being “Available”, “Busy”, or “On Break”, since 12:00 AM today.

3. When finished, click **Close**.

Wrapping Up

Wrap up is the time after an Interaction ends when you can take care of different tasks. For example, after an Interaction ends, your Supervisor may want you to fill out a form or make sure that there is a Contact record for your most current customer.

Your Administrator can configure the system to give you a specific amount of Wrap Up time after each Interaction to take care of various tasks.

- Since Wrap Up time is optional, ask your Supervisor or Administrator if your call center uses wrap up time and how much time you have.
- Your status remains “Busy” while you are in Wrap Up. When Wrap Up ends, the system automatically changes your status back to “Available.”

To Use Wrap Up

If your call center is configured to use Wrap Up:

1. Either you or the customer will end the Interaction.

2. If Outcomes are used in your call center, select an Outcome and click the **Select** button (see “Assigning Outcomes” on page 4-23).

What Happens During Wrap Up?

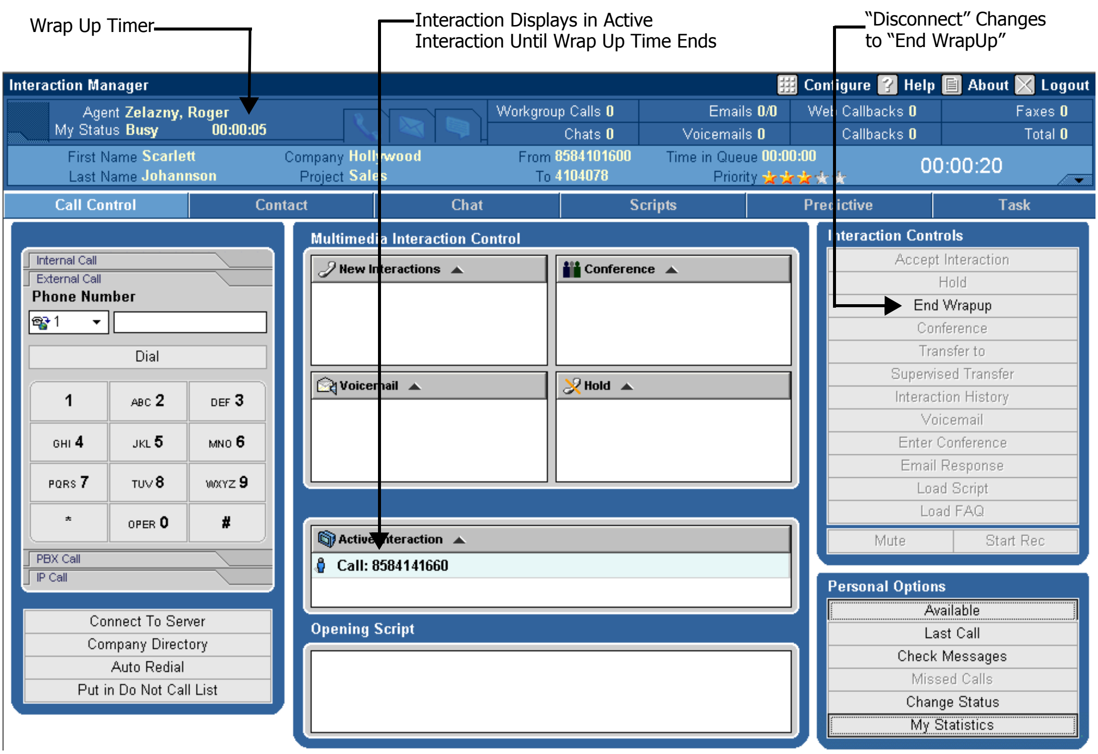

Figure 11-3 Call Control Screen During Wrap Up

3. A timer appears next to your status in the banner area.

   The timer starts when the Interaction ends or immediately after you select an Outcome. The timer starts at zero and counts up.

4. The Interaction displays in the Active Interaction area until Wrap Up ends.

5. The **Disconnect** button changes to **End Wrap Up**.

   You can end the wrap up time right away by clicking the **End Wrap Up** button. Your status returns to “Available.” Otherwise, Wrap Up ends when you reach the amount of time set by your Administrator.

While you are in Wrap Up, you can still click the **Available** button and accept another Interaction. Both Interactions appear in the Active Interaction area until Wrap Up time ends for the first Interaction.

Controlling Your Status

Interaction Manager lets you control your availability to accept or refuse incoming Interactions. For example, if you need to leave your station for lunch, a break, or if you need time after a recently concluded Interaction, you can make yourself temporarily unavailable for new Interactions. You can also change your status to Available after accepting one interaction, so that CCA will automatically route a new interaction to you (allowing you to handle multiple interactions). CCA only routes calls to Agents who are available.

You can control your status in three ways:

- Select the **Available** button to immediately change your status to Available.
- Select the **Last Call** button to tell the system not to give you any more calls.
- Select the **Change Status** button to select a custom status that has been created for your call center.

When to Use the Available Button

Generally, your status automatically returns to *Available* when you finish an Interaction. But there are some times when you may want to click the **Available** button and manually change your status.

For example, if you are away from your desk and your status is *Available*, the system may offer you a call.

If you don’t accept the call (because you are away), the system offers the call to another Agent and changes your status to *No Answer.*

When you get back to your desk, you must click the **Available** button to let the system know you are ready to accept Interactions.

Another way to handle this situation would be to use the **Change Status** button (see below).

You can also use the **Available** button if you want to handle more than one phone Interaction at the same time. See “To Accept Multiple Phone Interactions” on page 4-4.

When To Use the Last Call Button

When you are going to be away from your computer for a while, you can click the **Last Call** button to let the system know you are not available to take any more Interactions. The Last Call button turns red and your status displays as *Last Call*. You can change your status back to **Available** by clicking the **Last Call** button again.

- If you are <u>not</u> handling an Interaction at the time you click the **Last Call** button, the system will not offer you an Interaction until you change your status back to *Available*.

- If you <u>are</u> handling an Interaction when you click the **Last Call** button, you can complete the Interaction as you normally would. When you finish the Interaction, you can leave your workstation. The system will not offer you another call until you click the **Last Call** button again.

When to Select a Custom Status

Your Administrator can create custom statuses for your call center, such as “Internal Meeting,” “Training,” and so forth. No matter what the custom status displays, your status to the <u>system</u> is always:

- **Available** (to take Interactions) or

- **Busy** (not available to take Interactions) or

- **On Break** (not available to take Interactions)

The agent may see a “No Answer” status if they did not accept a workgroup interaction within the time limit. (“No Answer” is the same as “On Break.”)

Custom statuses allow you to be more specific about what you are doing.

To Select a Custom Status

1. Click the **Call Control** tab.

2. Click the Change Status button (Figure 11-4), located in the Personal Options area.

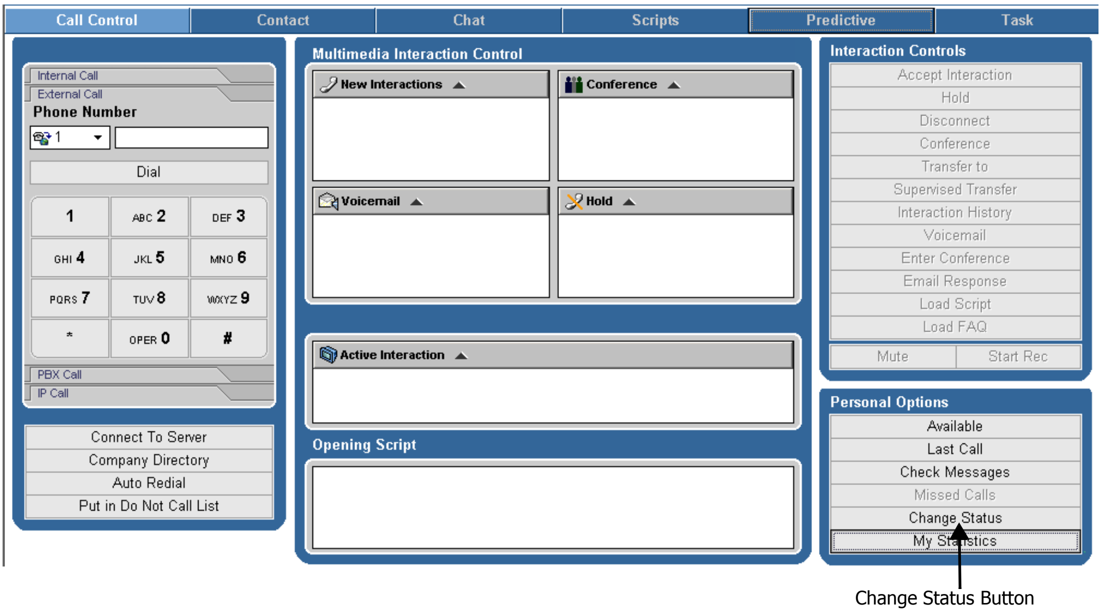

Figure 11-4 Change Status Button

The Status List dialog box (Figure 11-5) appears, showing all of the custom statuses created by your Administrator.

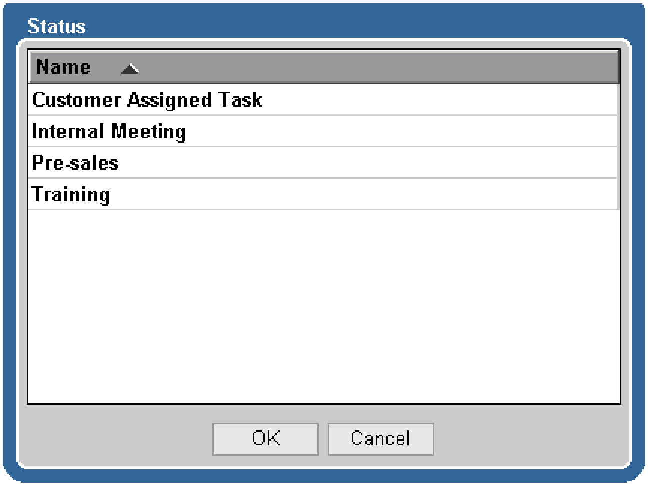

Figure 11-5 Status Dialog Box

3. Double-click a status from the list (or selecting it and click **OK**).

   Your new status appears on the Information Bar. In addition, your Supervisor can also see your new status.

Managing Missed Calls and Voicemail Messages

About Missed Calls

If someone calls you while you are away from your desk, and they hang up without leaving a voicemail message, use the **Missed Calls** feature to find their phone number and the time when they called.

About Voicemail Messages

If someone calls you while you are away from your desk, and they leave a voicemail message, use Interaction Manager to retrieve the voicemail.

There are two types of voicemail messages:

- **ACD voicemail messages**: When the customer dialed the number of your call center and was routed to you. If you are unable to take the call, the customer can leave a voicemail message for you.

- **Non-ACD voicemail messages**: When the caller dialed your phone number directly. If you are unable to take the call, they can leave a voicemail message for you.

See "Handling Phone Interactions" on page 4-1 for more information on the difference between ACD and non-ACD calls.

You can also access your voicemail messages:

- While you are logged into Interaction Manager

  or

- By dialing into the system from any phone.

What to Know Before Retrieving Voicemail Messages

Before you can retrieve your voicemail messages:

1. You may need to configure your email client. See “Notification Mode (for New Interactions)” on page 2-5.

2. You may need to add audio software on your computer so that you can listen to the voicemail.

This chapter describes what the CallCenterAnywhere software *can* do. However, not all of these features may be enabled at your site. Please see your Supervisor or Administrator if you are not sure which features your site uses.

Retrieving Voicemail Messages From Interaction Manager

Follow the steps in this section to retrieve your voicemail messages when you are logged into Interaction Manager.

To Retrieve Non-ACD Voicemail Messages From Interaction Manager

If the **Check Messages** button in the Call Control tab is red, it means someone called your phone number directly and left a voicemail message for you. To retrieve your voicemail:

1. Click the **Call Control** tab.

2. Click the **Check Messages** button.

    a. Your email program opens showing a new email message in your inbox.

    b. When you open the new email message, you will find the voicemail message as an attachment.

3. In most email programs, double-click on a sound file attachment and your sound player automatically opens.

To Retrieve ACD Voicemail Messages From Interaction Manager

If when you login a voicemail message appears as an Interaction, it means someone dialed the number of your call center, was routed to your phone, and left a voicemail message for you.

Use email or your phone to retrieve ACD voicemails. (Ask your Supervisor or Administrator if you aren't sure which method works with your system.)

To Retrieve ACD Voicemail Messages Using Your Email Program:

1. Accept the voicemail Interaction. Your email client opens showing a new email message in your inbox.

2. Open the new email message and you will find that the voicemail message is included as an attachment.

3. In most email programs, double-click on the sound file attachment and your sound player program automatically opens.

To Retrieve ACD Voicemail Messages Using Your Phone

1. Accept the voicemail Interaction. Your phone rings.

2. Pick up your phone and listen to a menu of options.

3. Select the options to play and delete your voicemail messages.

Retrieving Voicemail Messages from a Remote Phone

If you are away from your Interaction Manager workstation, you can still retrieve voicemail messages using a remote phone. By "remote" phone, we usually mean a phone that is outside of your company, such as your home phone, cell phone, or a phone that you use while you are travelling.

You cannot, however, retrieve voicemail messages if your email program is running and is set to remove your email messages from the email server.

If you plan to retrieve voicemail message remotely, make sure you shut down your email program before leaving your workstation, or configure your email program so that it leaves a copy of your email messages on the email server.

Your Administrator must configure a Project that uses the Mailbox Manager feature. See your Supervisor or Administrator for more information.

To Retrieve Voicemail Messages Remotely

You can use your extension number or your Interaction Manager username and password, if they consist only of **numbers**.

For example:
Extension: 789
Username: 12345
Password: 67890

The numbers can be anything that you want; something that is secure and which you can remember. (Contact your Administrator if you need to change your username and password.)

To Retrieve Non-ACD Voicemail Messages From a Remote Phone

A non-ACD voicemail occurs when someone calls your work number directly and leaves a message for you.

If you are not logged into Interaction Manager and you want to dial into the system to get your non-ACD voicemail messages, then:

1. From any phone, dial the phone number for your Project. (Ask your Supervisor or Administrator if you are not sure what number to dial.)

2. Listen to the phone menu. The phone menu tells you which number to press to connect to the Mailbox Manager feature.

3. Press the number provided by the phone menu. The phone menu prompts you to enter your mailbox number.

    a. Instead of entering your mailbox number, enter your Interaction Manager extension or username. (Remember that for remote message retrieval, your username must consist only of numbers.)

    b. When you finish entering your extension or username, press the **#** (pound) key.

c. The menu prompts you for your password.

d. Enter your Interaction Manager password and press the **#** (pound) key. (Your password must consist only of numbers.)

e. Follow the instruction prompts to retrieve your voicemail messages.

To Retrieve ACD Voicemail Messages From a Remote Phone

An ACD voicemail occurs when someone calls your company, gets routed to you, and then leaves a message for you.

Even when you are not logged into Interaction Manager, you can dial into the system and get your ACD voicemail messages. However, this feature must be configured at your site by your Administrator. Figure 11-6 shows an example of how ACD Voicemail retrieval works.

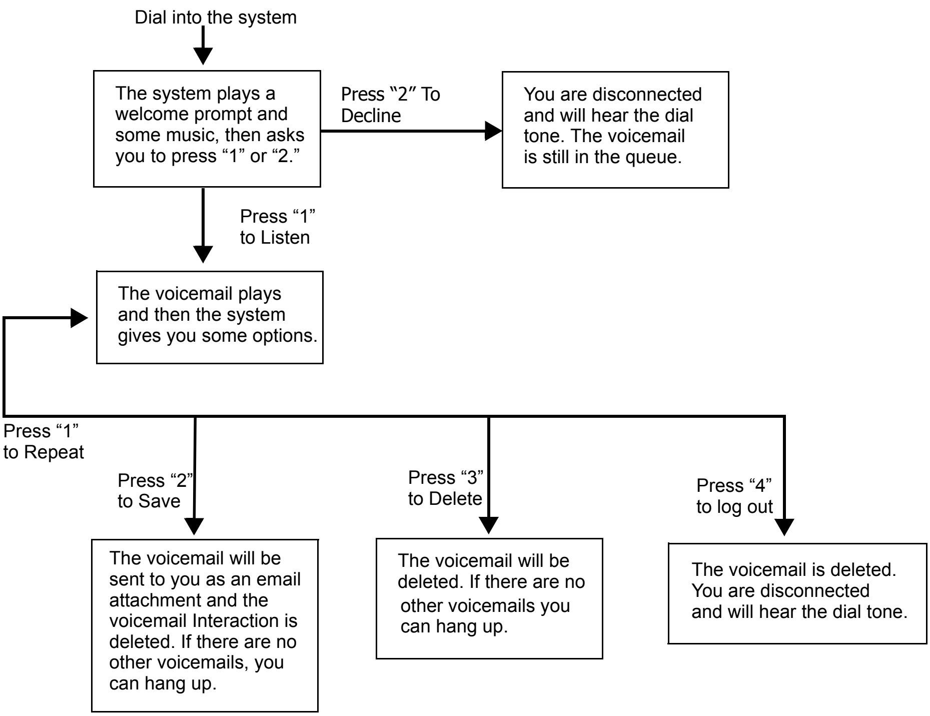

Figure 11-6 Remote Access to ACD Voicemail

1. Ask your Supervisor or Administrator if this feature is available at your call center.

2. If the feature is available, ask your Administrator or Supervisor for the number to call from the remote phone.

3. Dial the number and go through a phone menu, if necessary.

   The system asks you to enter your username and password, just as though you were logging into Interaction Manager.

Your username and password must consist only of numbers, for example:
Username: 007
Password: 90210

---

4. Enter your username and password.

   The system gives you a few options, one of which is to listen to your ACD voicemail messages. (You maybe asked to press a key on your phone to retrieve your ACD voicemail messages.)

Checking Missed Phone Calls

Interaction Manager keeps track of all customer's phone numbers and the times when they tried to reach you, even if a customer reaches your voicemail and hangs up without leaving a message.

To Retrieve Customer Phone Number and Call Times

1. Click the **Call Control** tab.

   The **Missed Calls** button (in the Personal Options area) appears red, if anyone called for you while you were unavailable.

2. Click the **Missed Calls** button.

   The Missed Calls dialog box (Figure 11-7) appears and shows you who called, when they called, and their phone number.

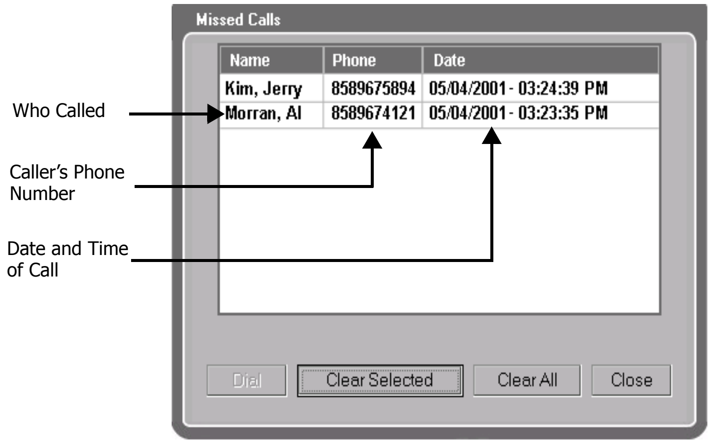

Figure 11-7 Missed Call Dialog Box

3. Call the person back by selecting their name and clicking the **Dial** button.

   or

4. Remove a customer from the Missed Calls dialog box by selecting the customer and clicking the **Clear Selected** button.

   or

5. Remove all missed calls by clicking the **Clear All** button.

Creating a Scheduled Conference

Anyone with a CallCenterAnywhere account can schedule a conference, after an Administrator finishes the conferencing setup.

1. Ask your Administrator what phone number to use for the conference call.

2. Start Internet Explorer and enter the Conference Web page address:

   http://<*web server host*>/taw/CreateConference/

   The Create Conference Web page (Figure 11-8) opens.

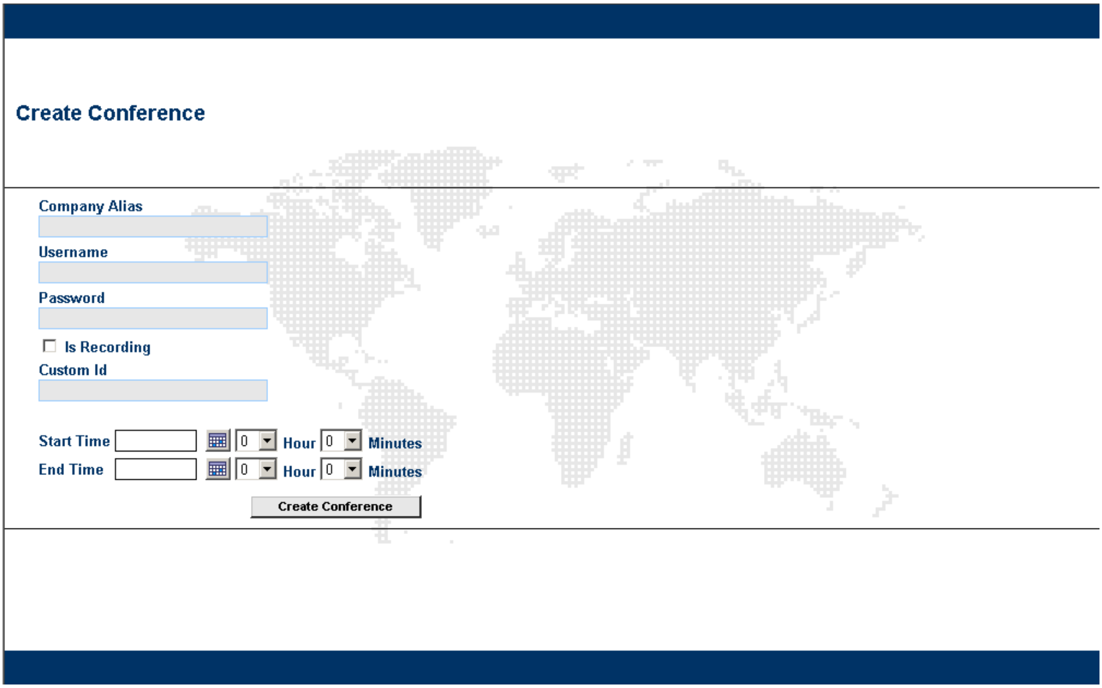

Figure 11-8 Create Conference Web Page

3. Fill out the fields in the Web page (see Table 11-2) and click the **Create Conference** button.

Table 11-2. Create Conference Web Page Fields & Descriptions

Field	Description
Company Alias Username Password	Enter the same information that you use when you log into Administration Manager, Supervision Manager, or Interaction Manager. (See your Supervisor or Administrator if you don't know what to enter in these fields).
Is Recording	For the system to record the conference, check this box. (Supervisors can listen to the recorded conference later by using the Interaction History screen in Supervision Manager.)

Table 11-2. Create Conference Web Page Fields & Descriptions

Field	Description
Custom ID	This is an identification tag associated with the conference. It does not appear anywhere in any CC@ application, but it is stored in the CC@ database so companies can write custom queries for reporting on scheduled conferences.
Start Time End Time	Click the calendar icon to select a start day and an end day. From the drop-down menu, select the start time (hours and minutes) and the end time (hours and minutes) for the conference.

4. Click the **Create Conference** button.

   The Create Conference Web page changes (Figure 11-9) to show you two passwords:

   - Chair Password
   - Conference Password

Figure 11-9 Create Conference - Passwords

5. Immediately copy and save these passwords into a text or word processing document. (Do this because no one can join your conference without these passwords.)

   Here's the difference between the two passwords:

   - The first person who joins the conference using the Chair password is considered the meeting chairperson and will receive a warning notice that the conference is ending soon.

   - The chairperson can also choose to extend the conference, if they wish.

In general, keep the Chair password for yourself.

If two people join the conference using the chair password, and the first exits the conference, the remaining person becomes the meeting chair and receives the end of meeting notice.

---

6. Use your email program to notify all of the participants about the upcoming conference. The participants need to know:

   a. The start day and time, and the end day and time for the conference.

   b. The conference password.

   c. The conference phone number. (Ask your Administrator for this number.)

7. At the appropriate time, when participants call the phone number, they are prompted to enter the conference password.

   Participants are added to the conference, if they enter the correct password **and** the conference is in progress.

   However:

   If participants enter an incorrect conference password, or if the conference has ended, or if the conference hasn't started yet

   Then something else may happen, depending upon your system configuration*.

*These are all situations that are custom configured for your company. Ask your Administrator for more information.

Technical Notes

This chapter provides additional information you may find useful but not necessary when using the Interaction Manager.

Interaction Manager Hotkeys

Table A-1 shows shortcuts (hotkeys) you can use to preform various functions. So, for example, to load the interaction history, press the CTRL key at the same time you press K (on your computer's keyboard).

Table A-1. Hotkeys

Description	Hotkey
Load Interaction History	CTRL + K
Do Not Call	CTRL + U
Auto Redial	CTRL + J
About Interaction Manager	F10
Configuration	ALT + J
Interaction Manager Help	F1
Supervisor	CTRL + 0
Call Control	CTRL + 1
Contact	CTRL + 2
Chat	CTRL + 3
Scripts	CTRL + 4

Table A-1. Hotkeys

Description	Hotkey
Predictive	CTRL + 5
Custom	CTRL + 6
Tasks	CTRL + 7
Logout	ALT + L
Collaborate	ALT + C
End Chat Session	ALT + I
Push To Client	ALT + P
Chat Response	ALT + X
Send Text To Chat Client	ALT + S
Transfer	ALT + W
URL Library	ALT + U
Clear Display	ALT + M
Load FAQ	ALT + Q
Load Script	ALT + R
View	ALT + V
Open	ALT + O
Accept Interaction	ALT + N
Available	ALT + B
Bill Call To	CTRL + B
Change Status	ALT + G
Check Messages	ALT + K
Company Directory	CTRL + T
Conference	ALT + C
Dial	CTRL + G
Disconnect	ALT + Z
Email Response	ALT + X
Enter Conference	ALT + P
Exit conference	ALT + P
Hang Up	CTRL + H

Table A-1. Hotkeys

Description	Hotkey
Hold	ALT + O
Make This My Last Call	ALT + Y
Load Script	ALT + S
Missed Calls	ALT + I
Mute	ALT + U
UnMute	ALT + U
Load FAQ	ALT + Q
Start Record	ALT + R
Supervised Transfer	CTRL + Y
Transfer To	ALT + W
Voicemail	ALT + M
Connect To Server	CTRL + S
Disconnect From Server	CTRL + S

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